Scheduling V. 5.3

Primary Care Management Module (PCMM)

User Guide

September 1999

Department of Veterans Affairs
V*IST***A** Technical Services

Table of Contents

Introduction

Overview of the Primary Care Management Module

The Primary Care Management Module was developed to assist VA facilities in implementing primary care. PCMM supports both primary care and non-primary care teams. Teams are groups of staff members organized for a certain purpose. The software allows you to setup and define a team, assign positions to the team, assign staff to the positions, assign patients to the team, assign patients to practitioners, and reassign patients from one team to another team.

Tools are provided with the software to facilitate the startup process. These tools use the site's data (where available) to automate the following tasks: identify patients to be assigned to primary care; assign patients to teams; assign patients to practitioners via team positions.

As part of PCMM, you are able to control the transmission of MailMan messages to team positions. MailMan messages are categorized into patient death, inpatient activity, consult activity, and team activity. For each category, you can elect to have a position get messages for all patients on a team, only patients associated with that team position, or not send messages. You can also elect to have the messages for each category go to the position's preceptor.

Numerous reports may be generated. Some of the reports are affected by site parameters. Most of the reports may be printed through both the roll and scroll interface and the GUI (graphical user interface). Patient-oriented outputs, practitioner-oriented outputs, and team-oriented outputs may be produced.

The *Mass Team/Position Discharge* option provides the ability to discharge large numbers of patients from a team or position at one time. This option is only available through the roll and scroll interface. A confirmation MailMan message is generated from the utilization of this option.

Primary care team/position assignment/unassignment may be accomplished through the GUI interface or through the *Primary Care Team/Posn Assign or Unassign* Scheduling option and through the *PC Assign or Unassign* action in the Appointment Management option.

Every patient must be assigned a primary care provider (PCP). A PCP can be a staff physician, nurse practitioner, or physician assistant.

In some instances, a patient may be seen regularly by someone who is not licensed as an independent practitioner per the Health Care Finance Agency (HCFA), When those positions are established, they must be assigned a preceptor. Once a patient assignment is made to a position with a preceptor link, you will not be able to inactivate the link without establishing another.

The PCMM "business rules" provide information on how some of the PCMM fields will be handled for team and team positions. These rules are not intended to be all encompassing, but to allow basic checking within the system to ensure data integrity.

Windows Conventions

The startup, setup, and assignment functions for PCMM use a graphical user interface (GUI). You may refer to the Windows Conventions Section for an explanation of the windows elements and form buttons used by the module.

Autolinks - (This functionality has been disabled.)

Autolinks connect a team with a set of wards, inpatient beds, practitioners, specialties, and clinics.
NOTE: You cannot assign a patient to a primary care team or practitioner via autolinks. Autolinks will be used for inpatient teams by OE/RR.

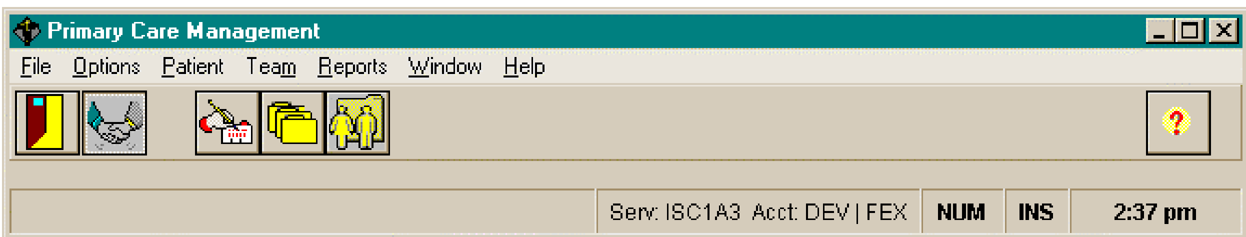
Report Templates

The Query Template Utility is provided on the GUI side to create report templates with a specified sort sequence and with specified category selections (divisions, teams, etc.). The templates may then be used to print the reports in the future without having to make sort selections and category selections each time.

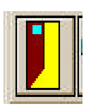
Starting PCMM

When the Primary Care Module is started, the Menu and Toolbar below is displayed. Select either the FILE | **V***IST***A** LOGON menu bar command or the Connect to/Disconnect from **V***IST***A** speedbutton to start.

Notice the status bar on the bottom of the screen consisting of five segments. The first segment is used to display status messages when a SAVE action has successfully completed. The second segment indicates whether you are connected (if so, where) or not connected to **V***IST***A**. The third shows the on/off status of the NUM LOCK key. The fourth displays insert/overwrite status but is not functional at this time. The fifth contains the current time.



Toolbar Speedbuttons

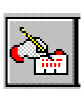


Close Application

Disconnects from the network and closes the application. If the network connection is still active, you will get a confirmation request before closing the application.

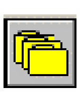
Connect to/Disconnect from V*IST*A

Logs on/off the network.



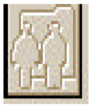
Team Setup

Opens the Select Team dialog box/Primary Care Team Profile form.



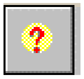
Position Setup

Opens the Select Team dialog box/Primary Care Team Position Setup form.



Assign Patients

Opens the Patient Lookup dialog box.



Show Associated Help

Opens the PCMM Help File.

Logging On

When either the FILE|**V***IST***A** LOGON menu bar command or the Connect to **V***IST***A** speedbutton is clicked, the **V***IST***A** Sign-on dialog box opens. System information concerning where you're currently working is provided. Enter your access code followed by the **tab** button. Enter your verify code and click the OK button. (The PCMM option must be assigned to you. If you get a message stating you are not registered to use PCMM, contact your IRM Service.)

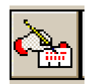
PCMM Parameters (PCMM Reassignment Mail Group)

Clicking the OPTIONS|PCMM PARAMETERS menu bar command opens the PCMM Parameters list box which displays the name of the PCMM Reassignment Mail Group. Members of this group receive the mail messages generated by the reassignment functionality. A new mail group, PCMM REASSIGNMENT, appears as the initial entry in this field.

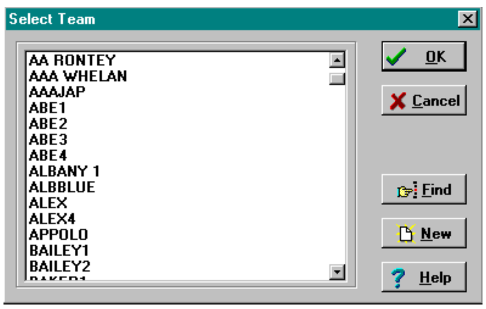
If you wish to change the mail group, click on the down arrow. The current entry is deleted and a list of possible choices is displayed (a new mail group cannot be created here). Click on the correct entry and then the OK button. A confirmation box appears stating the parameter has been updated. Click the OK button in the confirmation box.

Team Setup

Create a New Team

1. Click on the Team Setup toolbar speedbutton  or select the TEAM|SETUP menu bar command.

2. Click the NEW button of the Select Team dialog box and enter the new team name (3-30 characters).



Select Team Dialog Box Information
Click on the desired entry to highlight it, then click on the **OK** button to select. Clicking on **Cancel** closes the dialog box without selecting an entry. The scrollbar can be used to move up and down the list to find the desired entry. The **Find** button can be used to find a specific entry. If more than one match is found, the list box will clear and only the matching entries will be displayed. The **New** button allows you to enter a new team name. After entering the name, click on the OK button within the New Team dialog box.

NOTES

- Names are saved in all uppercase letters.
- If the TEAM/ACTIVE ONLY menu bar command is selected, only active teams appear for selection.

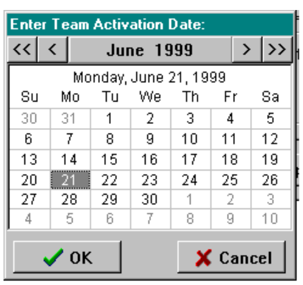
Create a New Team

3. The Primary Care Team Profile form appears. When initially setting up a team, information should be entered on the General and Settings tabs before clicking the SAVE button to store the data. Required fields are signified in this documentation by an asterisk ***** next to the field name. If all required fields are not completed, the SAVE button will not be enabled and you will not be able to save the information.

You may refer to the Windows Conventions Section for an explanation of the standard windows objects (i.e., list box, lookup box, ect.) and form buttons.

4. Enter the team information on the General and Settings tabs. (See following pages). When creating a new team, data entry is not required on the History tab. The History tab will not be available for a new team until the initial entry is saved. After you have entered all required data for the new team, click the SAVE button.

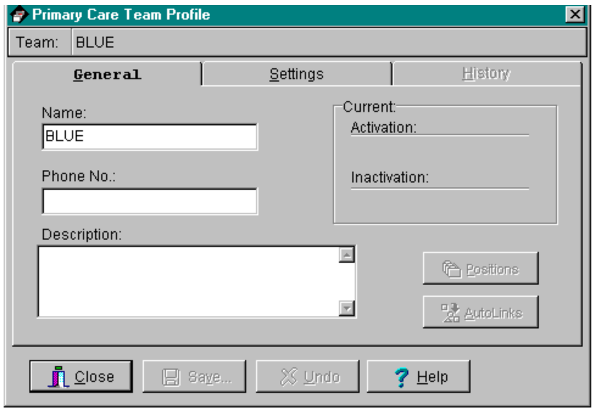
5. The popup calendar appears. Click on the date you wish to enter as the team activation date and click OK. The team has now been established.



If you wish to create positions on the team at this time, go back to the General Tab and click on the POSITIONS button. See the "Assign Positions to a Team" section under Team Setup for instructions.

Create a New Team

GENERAL TAB



Field Descriptions

***Name (text box)**
The name of the team, 3-30 characters in length. If the new team name matches an existing team name, you will be so notified and asked for a different name.

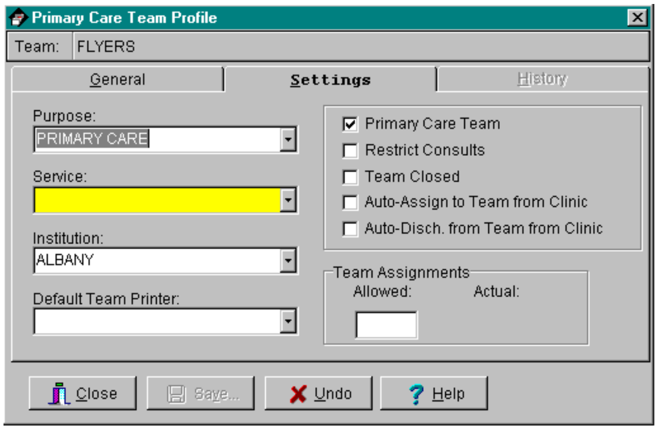
Phone No. (text box)
Enter a phone number for the team, 3-20 characters.

Description (text box)
Any descriptive information specific to the team.

Current Activation/Inactivation
These label fields display the most recent activation/inactivation date for the team.

Create a New Team

SETTINGS TAB



Field Descriptions

***Purpose (drop down list)**
The Purpose defines the role of the team. Primary care would be the usual choice but other kinds of teams may include Inpatient Ward, Community Care, etc.

***Service (lookup box)**
This is the medical center service most closely associated with the team. It is an entry from the SERVICE file (#49) and includes clinical and non-clinical services.

***Institution (lookup box)**
This is the entry from the INSTITUTION file (#4) associated with the team. It includes VA and non-VA institutions. **NOTE:** Each division at a multidivisional facility has its own entry in the INSTITUTION file.

Default Team Printer (lookup box)
The PCMM reports do not use this field.

Primary Care Team (check box)
Click in this box if this team can be the primary care team for any patient. Even if the team's purpose is not primary care, it still may be able to act as a primary care team. Only a team that can act as a primary care team may have a primary care practitioner position assigned to it.

Create a New Team

SETTINGS TAB

Restrict Consults (check box)

Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as "restrict consults" may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the Make Consult Appointment option. A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Team Closed (check box)

Click in this box to close the team. Additional patients should not be added to a team if it is designated as closed.

Auto-Assign to Team from Clinic (check box)

Click in this box to automatically assign the patient to a team when he is enrolled in a clinic that is an "associated clinic" of one of the team's positions. This will occur only if the associated clinic is unique to one team. It is recommended that **both** the Auto-Assign and Auto-Discharge boxes be checked or **neither** be checked.

Auto-Discharge from Team from Clinic (check box)

Click in this box to automatically discharge the patient from a team when he is discharged from a clinic that is an "associated clinic" of one of the team's positions. This will occur only if the patient has not been assigned to a team position.

Team Assignments (text box)

Allowed

The maximum number of patients that should be assigned to this team. Users are not prevented from adding additional patients to the team after the team's patient panel (list of patients) has reached this number. You should compare the current number of team assignments with the number allowed to balance team panel sizes.

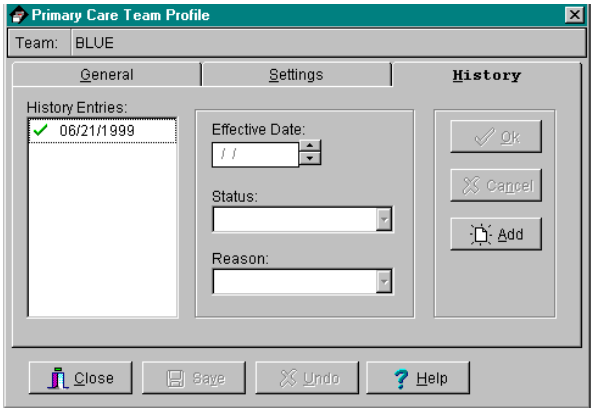
Actual

This is the number of patients currently assigned to this team.

Create a New Team

HISTORY TAB

When creating a new team, no data entry is required on this tab.



Field Descriptions

History Entries (list box)
This display shows the history of status change dates for this team. Double clicking an entry **or** highlighting an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

***Effective Date**
This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date (month/day/year) must consist of two characters (i.e., 02/22/96).

***Status (drop down list)**
This is the status of the team as of the effective date.

***Reason (drop down list)**
This is the reason for the change in the team's status.

Assign Positions to a Team

If you have clicked on the Positions button on the General Tab of the Primary Care Team Profile form, begin at Step 3.

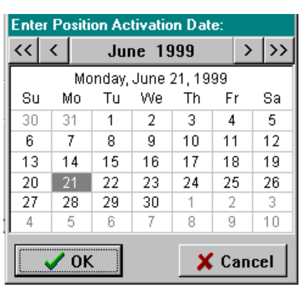
1. Select the TEAM|POSITIONS menu bar command.

2. Select the team from the Select Team dialog box and click the OK button.

3. The Primary Care Team Position Setup form appears along with the New Position dialog box. Enter the name of the new position and click OK. Positions that can act as preceptors should be created first so that they will exist for the team.

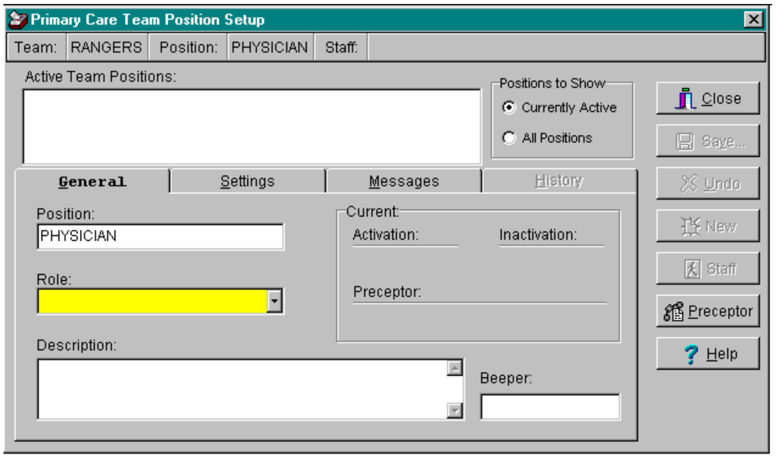
4. Enter the position information on the General, Settings, and Messages tabs (see following pages.) When initially creating a position, information should be entered on the General, Settings, and Messages tabs before clicking the SAVE button to store the data. No data entry is required on the History tab when creating a new position. All data displayed in the edit boxes applies to the position displayed in the forms header.

5. Required fields are signified in this documentation by an asterisk ***** next to the field name. You will not be allowed to save until all required fields have been completed. After you have entered all required data for the new position and clicked the SAVE button, this popup calendar appears. Click on the date you wish to enter as the position activation date and click OK. The position has now been established.



If you with to assign a staff member to the position at this time, click on the STAFF button. See the "Assign Staff Member to a Position" section under Team Setup for instructions.

Assign Positions to a Team



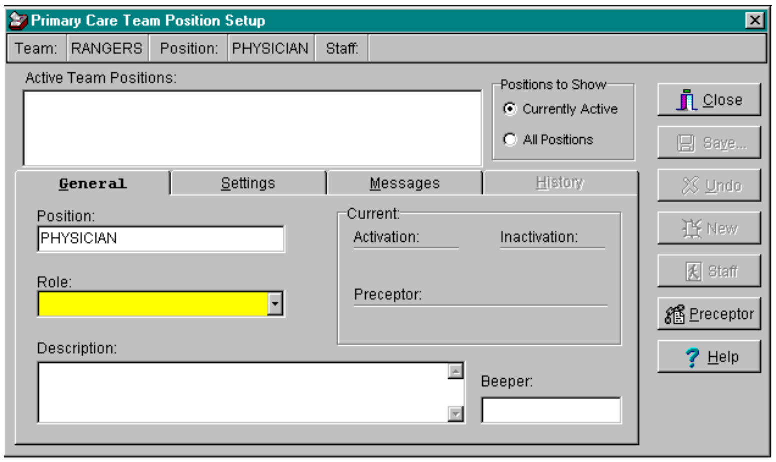
Field Descriptions

Team Positions (list box)
Displays team positions. The list box shows all team positions or only those currently active based on the Positions to Show selection. In order to select a position listed in the Team Positions list box, double click on the entry **or** click the entry and press the spacebar.

Positions to Show (radio button)
You may choose to show all positions associated with this team or only the currently active positions.

Assign Positions to a Team

GENERAL TAB



Field Descriptions

***Position (text box)**
The name of the position, 3-30 characters in length. If the new position name matches an existing position name on the current team, you will be so notified and asked for a different name.

***Role (drop down list)**
This is a list of standard roles to which the position is mapped.

Description (text box)
Descriptive information you may wish to add specific to the position.

Beeper (text box)
Beeper number for this position. This is a separate free text field. It is not linked to any other beeper or phone numbers in **V***IST***A**.

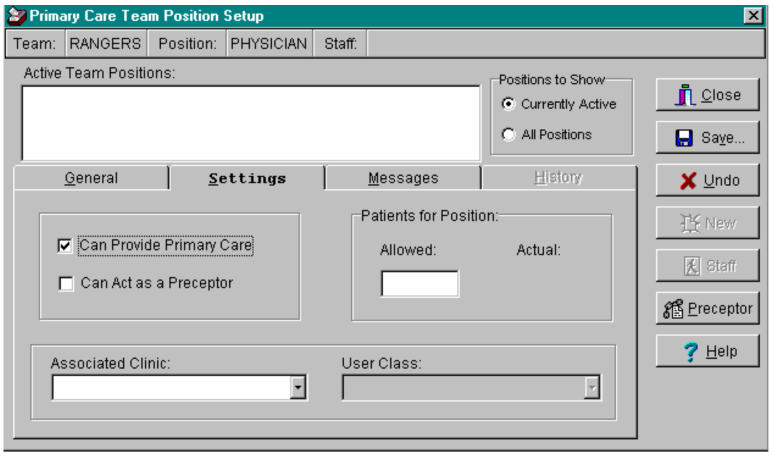
Current (label)

Activation/Inactivation
These label fields may display the most recent activation/inactivation date for the selected position.

Preceptor
A preceptor is a position that acts as a supervisor/monitor for this position.

Assign Positions to a Team

SETTINGS TAB



Field Descriptions

Can Provide Primary Care (check box)

Check this box if this position can function as a primary care position. The team must have been designated as able to provide primary care for a position on the team to provide primary care. If this is not checked, patient and position assignments cannot be designated as primary care.

Can Act as a Preceptor (check box)

Check this box if this position can act as a supervisor to other positions within the team. All preceptor positions should be set up prior to setting up any other positions.

Note that both of these checkboxes will be disabled if:

- the position is designated as "Can Act as a Preceptor" and is the current preceptor for any position on the team
- the position has a current preceptor and has a current or future patient assignment.

Assign Positions to a Team

SETTINGS TAB

Associated Clinic (lookup box)
If there is an existing clinic you wish to associate with this position, it should be entered here. Making an entry here allows users to enter the team name to select the clinic in certain Scheduling options. On the GUI side, it allows users to enroll patients to the clinic after assigning the patient to the position. Only one clinic association per position is allowed.

Patients for Position (text box)

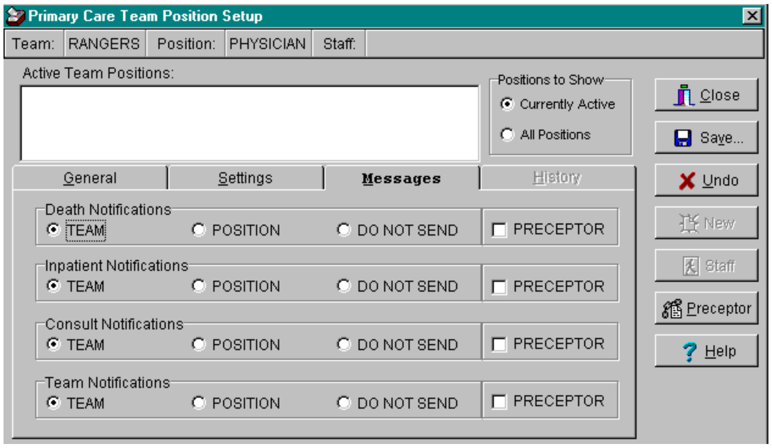
Allowed
The number of patients that should be assigned to this position. Users are not prevented from exceeding this number.

Actual
This is the number of patients that are currently assigned to this position.

***User Class (lookup box)**
This is the user class that must be used when selecting an individual to fill this position.
NOTE: This field may be disabled at some sites.

Assign Positions to a Team

MESSAGES TAB



As part of PCMM, you are able to control the transmission of MailMan messages to team positions. MailMan messages are categorized into patient death, inpatient activity, consult activity, and team activity. Check the appropriate button/box for each type of notification.

When creating a new position, be sure to click the SAVE button after data entry on this tab to store all the information you have entered here and on the previous two tabs.

Field Descriptions

Death Notifications
Will notify the recipient of entry/deletion of the DATE OF DEATH field for a patient.

Inpatient Notifications
Will notify the recipient of an inpatient admission/transfer/discharge for a patient.

Consult Notifications
Will notify the recipient of either an appointment being made or enrollment in a clinic in which the patient was not previously enrolled.

Team Notifications
Will notify the recipient of a patient's team activity (assignment, discharge, etc.).

Assign Positions to a Team

MESSAGES TAB

Button Descriptions

Team
If checked, the position will receive messages that are generated for all the team's patients.

Position
If checked, the position will receive messages that are generated only for those patients in the team associated with the position.

Do Not Send
If checked, the position will not receive messages.

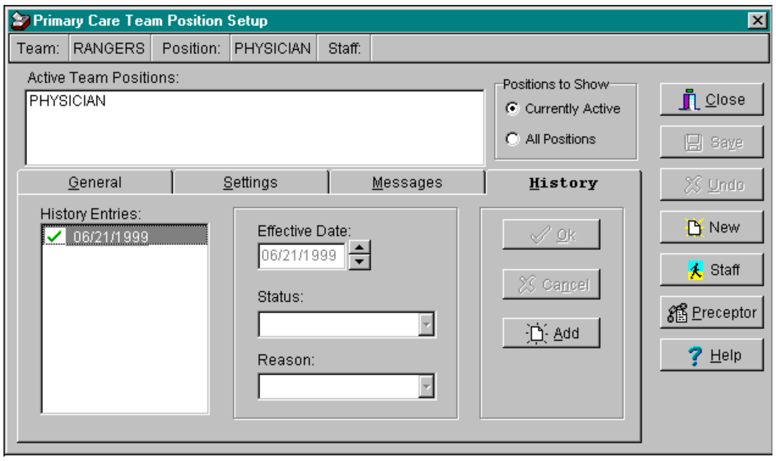
Checkbox Description

Preceptor
For each activity type - if checked, will add the position preceptor to the recipient list. The boxes will be disabled for preceptor positions.

Assign Positions to a Team

HISTORY TAB

When creating a new position, no data entry is required on this tab. The History tab will not be available for a new position until the initial entry is saved.



Field Descriptions

History Entries (list box)
This display shows the history of status change dates for this position. Double clicking an entry **or** clicking an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

***Effective Date**
This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date (month/day/year) must consist of two characters (i.e., 02/02/96).

***Status (drop down list)**
This is the status of the position as of the effective date.

***Reason (drop down list)**
This is the reason for the change in the position's status.

Assign Staff Member to a Position

(For positions that are NOT part of a preceptor link)

If you have clicked on the Staff button on the Primary Care Team Position Setup form, begin at Step 4.

1. Select the TEAM|ASSIGN STAFF menu bar command.

2. Select the team from the Select Team dialog box and click the OK button.

3. Select the position and click OK.

4. The Staff Assignment Add/Edit form appears. Click the ASSIGN button **or** choose the EDIT|ASSIGN MEMBER menu bar command.

5. The Staff Lookup dialog box appears. Type the staff member name (last,first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected.

6. The data fields on the Staff Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct. Close the form.

7. To inactivate the current assignment, click the INACTIVATE button **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Click the SAVE button.

Assign Staff Member to a Position

(For positions that ARE part of a preceptor link)

1. Select the TEAM|POSITIONS menu bar command.

2. Select the team from the Select Team dialog box and click the OK button.

3. Select the position from the Primary Care Team Position Setup form and click the STAFF button.

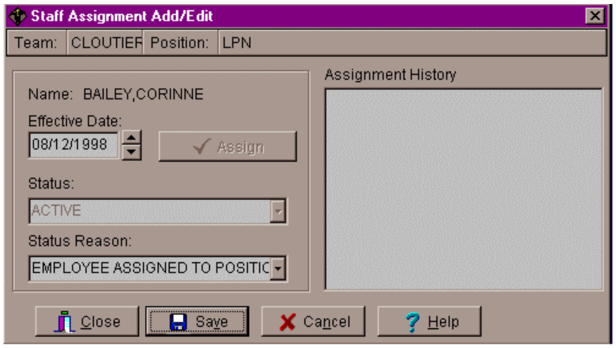
4. The Staff Assignment Add/Edit form appears. Click the ASSIGN button **or** choose the EDIT|ASSIGN MEMBER menu bar command.

5. The Staff Lookup dialog box appears. Type the staff member name (last,first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected. Staff members currently assigned to preceptor or precepted positions on the team may not be selectable depending on the type of position to which an assignment is being made.

6. The data fields on the Staff Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct. Close the form.

7. To inactivate the current assignment, click the INACTIVATE button **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Click the SAVE button. If you inactivate a staff assignment for a position that is a current preceptor for another position and attempt to close the Staff Assignment Add/Edit form without creating a current staff assignment, your inactivation change will not be saved.

Assign Staff Member to a Position



Field Descriptions

Assignment History (list box)
This display shows the history of staff member assignment dates for the selected position. Double clicking an entry **or** clicking an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

***Effective Date**
This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date must consist of two characters (i.e., 02/22/96).

***Status (drop down list)**
This is the status of the staff member as of the effective date.

***Status Reason (drop down list)**
This is the reason for the change in the staff member's status.

Assign Preceptor to a Position

NOTE: *A staff member must be assigned to the preceptor position before a preceptor assignment can be made.*

1. Select the TEAM|POSITIONS menu bar command.

2. Select the team from the Select Team dialog box and click the OK button.

3. Select the position from the Primary Care Team Position Setup form. The PRECEPTOR button will be enabled if the selected position is eligible to have a preceptor. Click the PRECEPTOR button.

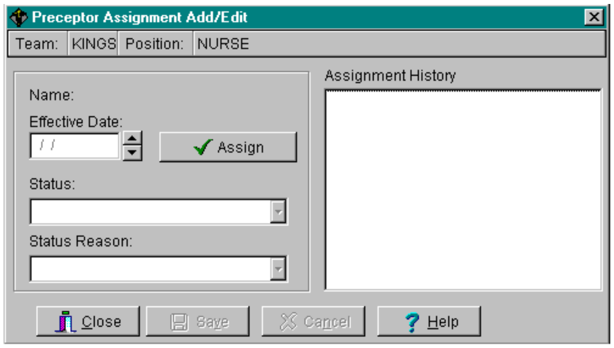
4. The Preceptor Assignment Add/Edit form appears. Click the ASSIGN button **or** choose the EDIT|ASSIGN MEMBER menu bar command.

5. The Select Preceptor Position dialog box appears. Click on the desired preceptor position then click OK. Only names of designated preceptor positions for the current team will be available for selection.

6. The data fields on the Preceptor Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct. Close the form.

7. To inactivate the current assignment, click the INACTIVATE button **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Click the SAVE button. If you inactivate a preceptor for a position with current or future patient assignments and attempt to close the Preceptor Assignment Add/Edit form without creating a current preceptor assignment, your inactivation change will not be saved.

Assign Preceptor to a Position



Field Descriptions

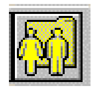
Assignment History (list box)
This display shows the history of preceptor position assignment dates for the selected position. Double clicking an entry **or** clicking an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

***Effective Date**
This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date must consist of two characters (i.e., 02/22/96).

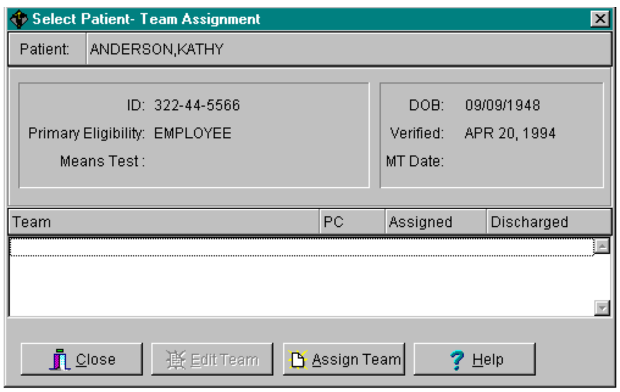
***Status (drop down list)**
This is the status of the preceptor position assignment as of the effective date.

***Status Reason (drop down list)**
This is the reason for the change in the preceptor position assignment status.

Assign Single Patient to Team/Position(s)

1. Click on the Assign Patients toolbar speedbutton  or select the PATIENT|PATIENT ASSIGNMENT menu bar command.

2. The Patient Lookup dialog box appears. Type the patient name (last,first) and click the SEARCH button. If there is more than one match, possible matches will appear in the list box. Double click your selection **or** single click then click the SELECT button.

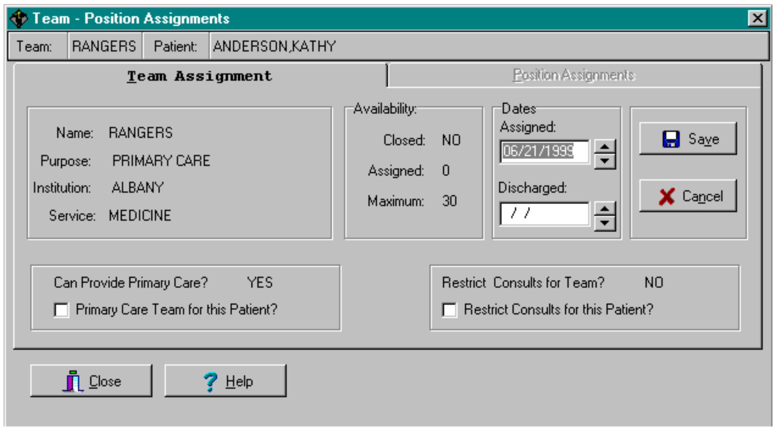


3. The Select Patient-Team Assignment form appears. Based on whether or not the SHOW ALL TEAM ASSIGNMENTS menu bar command is selected, all team assignments or only current assignments will appear in the list box. An asterisk in the PC column indicates the primary care team for this patient. Click the ASSIGN TEAM button and then select the team you wish to assign the patient to.

4. The Team - Position Assignments form appears. On the Team Assignment tab, check the Primary Care Team and Restrict Consults check boxes as appropriate. Change the Date Assigned if necessary. Click the SAVE button. Enter the information on the Position Assignments tab (see POSITION ASSIGNMENTS TAB).

Assign Single Patient to Team/Position(s)

TEAM ASSIGNMENT TAB



Field Descriptions

Dates

***Assigned**
The date the patient is assigned to the team. Default will be today.

Discharged
The date the patient is discharged from the team.

Primary Care Team for this Patient? (check box)

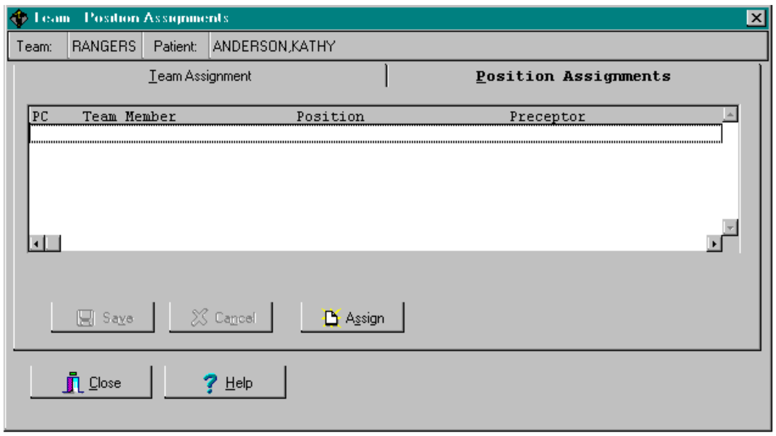
Check this box if this team will be the primary care team for this patient. Patients may have only one team designated as their primary care team.

Restrict Consults for this Patient? (check box)

Check this box if you wish to restrict consults for this particular patient. This is only applicable to teams where consults are not restricted for the entire team.

Assign Single Patient to Team/Position(s)

POSITION ASSIGNMENTS TAB



The Position Assignments tab displays existing assignments to positions on the selected team. The PC column will contain an asterisk to identify primary care provider positions and an x to identify associate provider positions. Other data provided includes position name, standard role, staff member, and whether or not the position can act as a preceptor.

1. Click the ASSIGN button. From the Select Position dialog box, choose the position you're assigning the patient to and click OK.

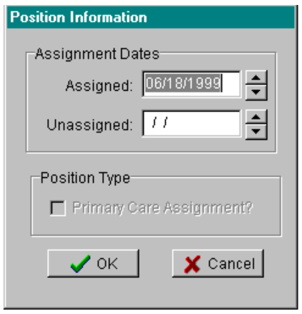
2. The Position Information dialog box appears. Edit the assignment date and position type, if necessary. Click OK. Then click the SAVE button on the Position Assignments tab.

If the position has been associated with a clinic and the patient is not already enrolled there, you will now be asked if you want to enroll the patient in that clinic. If you answer YES, you will be asked if this is an outpatient enrollment. If you answer NO to outpatient enrollment, the enrollment will automatically be an ambulatory care enrollment.

3. If you wish to assign this patient to another position on this team, click the right mouse button and select "new position". See Step 2.

Assign Single Patient to Team/Position(s)

POSITION ASSIGNMENTS TAB



Field Descriptions

***Assignment Dates**
Enter the date you are assigning the patient to the position.

Position Type

Primary Care Assignment (check box)
Check the box if this is a primary care assignment.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

1. Select the PATIENT|MULTIPLE ASSIGNMENTS|TEAM ASSIGNMENT menu bar command.

2. Select a team through the Select Team To Assign To dialog box.

3. The Multiple Patient Assignments to Team form appears. Check the Primary Care Assignment and Restrict Consults check boxes if applicable.

4. From the *Select Patients by* drop down list, choose the method of patient selection. If your selection method is *PC Assignment with No Team,* click the GET LIST button and then enter the effective date. Go to Step 6.

5. Select the *clinic/stop code/clinic appointment/team* from the drop down list.

If you click the GET LIST button, patient names will appear in the *Available to Assign* box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names. If your selection method was stop code or clinic appointment, you will be asked for a date range.

If you click the SELECT ALL button, you will get a confirmation box asking if you want to select all patients. If you click YES, all patients will **automatically** be assigned. No entries will appear in either list box and you do not need to proceed further.

6. Make your patient selections by clicking on the name.

NOTE: The lists of patients which currently appear in the *Available to Assign* and *New Assignments* boxes may be printed to a local (non-**V***IST***A**) printer via a popup menu. Access the popup menu by clicking the right mouse (with the cursor inside the box) while the list is active.

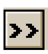
Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

7. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

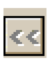
- Double clicking on an entry
- Click and drag
- Using the arrow buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.



Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

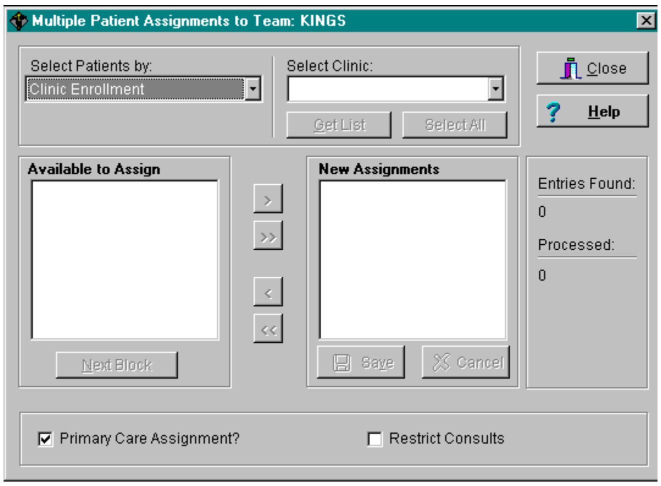


Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box.

8. Click the SAVE button. The selected patients are now assigned to the selected team.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT



Field Descriptions

Select Patients by (drop down list)
You may choose to select the patients by clinic enrollment, stop code (active stop codes only), appointments, team enrollment, or pc assignment with no team.

Select {patient selection method} (drop down list)
Choose the clinic, stop code, clinic appointment, or team from which you wish to assign patients.

Available to Assign (list box)
Contains names of patients who are available to be assigned to the selected team.

New Assignments (list box)
Contains names of patients who will be assigned to the selected team once the SAVE button is clicked.

Entries Found - Processed
Displays the total number of entries found matching the selection criteria. Once the assignment is made and saved, the number of entries processed will be displayed.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

Primary Care Assignment (check box)
Check this box if this team is to be the primary care team for these patients. The team must be able to provide primary care.

Restrict Consults (check box)
Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as "restrict consults" may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

1. Select the PATIENT|MULTIPLE ASSIGNMENTS|POSITION ASSIGNMENT menu bar command.

2. Select a team through the Select Team To Assign To dialog box.

3. Select a position through the Select Position in Team dialog box.

4. The Multiple Patient Assignments to: {Position in Team} form appears. Check the Primary Care Assignment check box on the bottom of the form, if applicable.

5. From the *Select Patients by* drop down list, choose the method of patient selection. If your selection method is *PC Assignment with No Team*, click the GET LIST button and then enter the effective date. Go to Step 7.

> **5a.** If you choose the "position enrollment" method of patient selection, the Select Team dialog box will appear.
> - To assign patients from one position to another position on the same team, select the team chosen at Step 2.
> - To assign patients from a position on one team to a position on another team, select the team **from** which you wish to assign patients.

6. Select the *clinic/stop code/clinic appointment/team/position* from the drop down list.

If you click the GET LIST button, patient names will appear in the *Available to Assign* box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names. If your selection method is stop code or clinic appointment, you will be asked for a date range.

If you click the SELECT ALL button, you will get a confirmation box asking if you want to select all patients. If you click YES, all patients will **automatically** be assigned. No entries will appear in either list box and you do not need to proceed further.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

7. Make your patient selections by clicking on the name.

NOTE: The lists of patients which currently appear in the *Available to Assign* and *New Assignments* boxes may be printed to a local (non-**V***IST***A**) printer via a popup menu. Access the popup menu by clicking the right mouse (with the cursor inside the box) while the list is active.

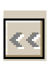
8. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the arrow buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

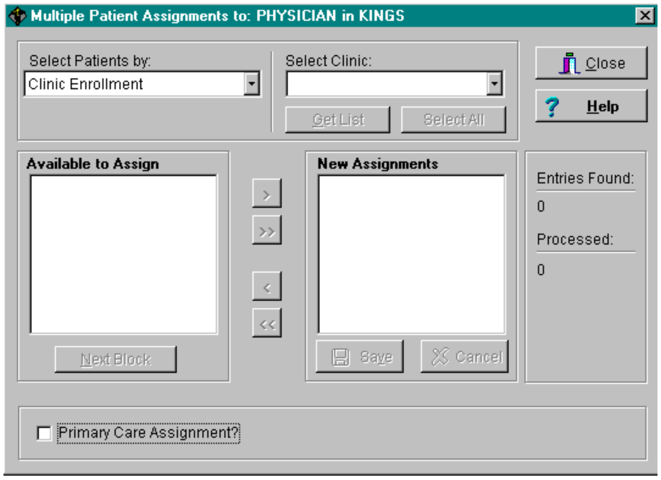


Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box.

9. Click the SAVE button. The selected patients are now assigned to the selected position.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT



Field Descriptions

Select Patients by (drop down list)
You may choose to select the patients by clinic enrollment, stop code (active stop codes only), appointments, team enrollment, position enrollment, or pc assignment with no team.

Select {patient selection method} (drop down list)
Choose the clinic, stop code, clinic appointment, team, or position from which you wish to assign patients.

Available to Assign (list box)
Contains names of patients who are available to be assigned to the selected position.

New Assignments (list box)
Contains names of patients who will be assigned to the selected position once the SAVE button is clicked.

Entries Found - Processed
Displays the total number of entries found matching the selection criteria. Once the assignment is made and saved, the number of entries processed will be displayed.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

Primary Care Assignment (check box)
Click in this box if the position you are assigning to is a primary care position for these patients. The position must be able to provide primary care.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

1. Select the PATIENT|MULTIPLE REASSIGNMENTS|TEAM REASSIGNMENT menu bar command.

2. The Multiple Patient Team Reassignment form appears. Check the Primary Care Assignment and Restrict Consults check boxes if applicable.

3. From the *FROM Team* drop down list, select the team **from** which you are reassigning patients. From the *TO Team* drop down list, select the team **to** which you are reassigning patients. Patient names will appear in the *Available to Assign* list box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

4. Make your patient selections by clicking on the name.

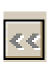
5. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the arrow buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

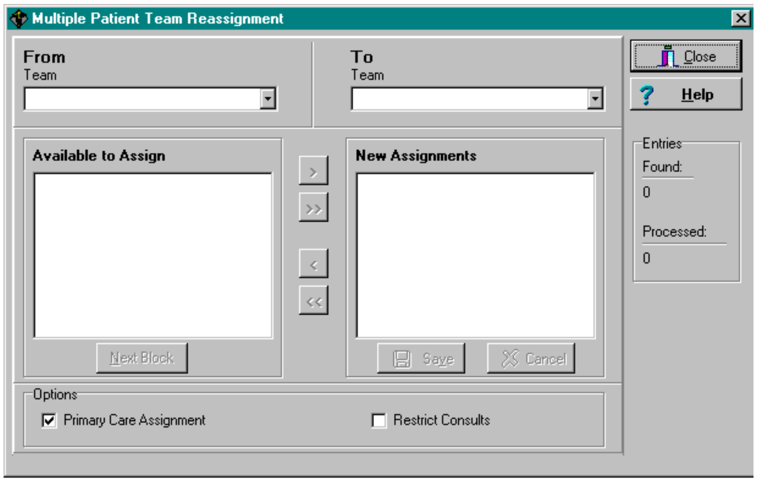


Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box.

6. Click the SAVE button. The selected patients are now reassigned to the selected team. Information concerning patients who were not reassigned will be provided to the user via a new MailMan message.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT



Field Descriptions

FROM Team (drop down list)
Select the team from which you wish to reassign patients.

TO Team (drop down list)
Select the team to which you wish to reassign patients.

Available to Assign (list box)
Contains names of patients who are available to be reassigned to the selected *To* team.

New Assignments (list box)
Contains names of patients who will be reassigned to the selected *To* team once the SAVE button is clicked.

Entries Found - Processed
Displays the total number of entries found matching the selection criteria. Once the reassignment is made and saved, the number of entries processed will be displayed.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

Options

Primary Care Assignment (check box)
Check this box if you want the *To* team to be the primary care team for these patients. The team must be able to provide primary care.

Restrict Consults (check box)
Click in this box to prevent users from making consult appointments to clinics in which the *To* team's patients are not enrolled. Patients who are listed as "restrict consults" may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

1. Select the PATIENT|MULTIPLE REASSIGNMENTS|POSITION REASSIGNMENT menu bar command. The Multiple Patient Position Reassignment form appears.

2. Check the desired radio button under *Assignment Status* and select the date/date range under *Assignment Dates* if applicable.

3. Select a team from the *FROM Team* drop down list and a position from the *FROM Position* drop down list. Patient names will appear in the *Available to Assign* list box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

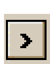
4. Select a team from the *TO Team* drop down list and a position from the *TO Position* drop down list.

5. Check the *Primary Care Assignment* check box on the bottom of the Multiple Patient Position Reassignment form if applicable.

6. Make your patient selections by clicking on the name.

7. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

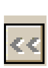
- Double clicking on an entry
- Click and drag
- Using the arrow buttons



Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

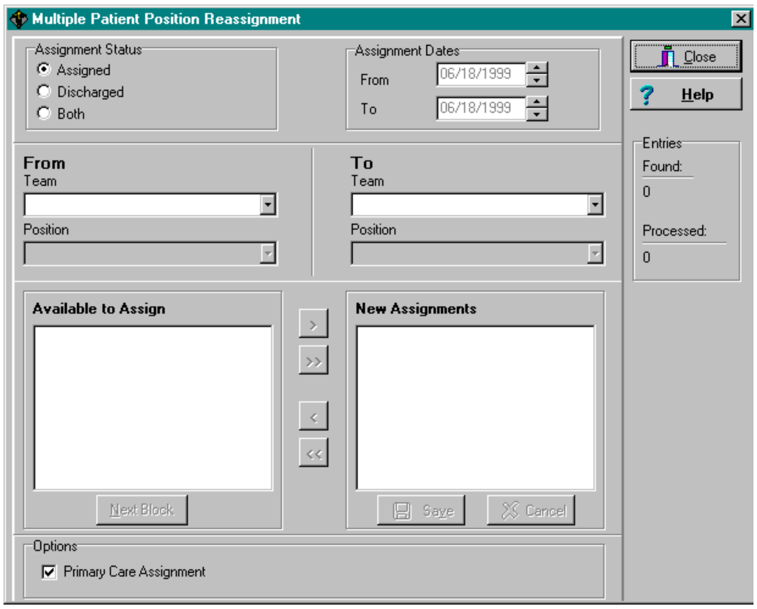


Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

8. Click the SAVE button. The selected patients are now reassigned to the selected team and position. Information concerning patients who were not reassigned will be provided to the user (and to members of the PCMM Reassignment Mail Group) via a new MailMan message.



Field Descriptions

Assignment Status (radio button)
Select the assignment status for the list of patients which will appear in the FROM Position list box.

Assigned - Patients currently assigned to the selected FROM position.
Discharged - Patients who have been discharged from the selected FROM position.
Both - Patients in both the Assigned and Discharged categories.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Assignment Dates
Select the date or date range for the selected assignment status.

If Assignment Status is	
Assigned	Date range will not be enabled.
Discharged	Both *from* and *to* date fields will be enabled.
Both	Only *from* date field will be enabled. Range will be to current date.

FROM Team (drop down list)
Select the team from which you wish to reassign patients.

FROM Position (drop down list)
Select the position from which you wish to reassign patients.

TO Team (drop down list)
Select the team to which you wish to reassign patients.

TO Position (drop down list)
Select the position to which you wish to reassign patients.

Available to Assign (list box)
Contains names of patients who are available to be reassigned to the selected *To* team and position.

New Assignments (list box)
Contains names of patients who will be reassigned to the selected *To* team and position once the SAVE button is clicked.

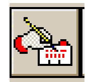
Entries Found - Processed
Displays the total number of entries found matching the selection criteria. Once the reassignment is made and saved, the number of entries processed will be displayed.

Options

Primary Care Assignment (check box)
Click in this box if the position you are assigning to is a primary care position for these patients.

Edit an Existing Team

TEAM SETUP

1. Click on the Team Setup toolbar speedbutton  or select the TEAM|SETUP menu bar command.

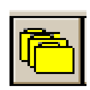
2. Select the team you wish to edit from the Select Team dialog box and click the OK button.

3. Enter the correct information on the General or Settings tabs of the Primary Care Team Profile form. Click the SAVE button after editing for the data to be stored.

4. To inactivate the selected team, first click the ADD button on the History tab. After all data is entered, the OK button becomes enabled. Click the OK button to add the new entry to the History Log and store the information.

POSITION SETUP

These steps cover editing of an existing position. If you are assigning a new position to a team, see "Assign Positions to a Team" under Team Setup.

1. Click on the Position Setup toolbar speedbutton  or select the TEAM|POSITIONS menu bar command.

2. Select the team whose positions you wish to edit from the Select Team dialog box and click the OK button.

3. Double click the position you wish to edit from the Teams Position list box on the Primary Care Team Position Setup form. Enter the correct information on the General, Settings, or Messages tabs. Click the SAVE button after editing for the data to be stored.

4. To inactivate the selected position, first click the ADD button on the History tab. After all data is entered, the OK button becomes enabled. Click the OK button to add the new entry to the History Log and store the information.

STAFF ASSIGNMENT

(For positions that are NOT part of a preceptor link)

These steps cover editing where a staff member has already been assigned to a position. If you are initially assigning a staff member to a position, see "Assign Staff Member to a Position (For positions that are NOT part of a preceptor link)" under Team Setup.

1. Select the TEAM|ASSIGN STAFF menu bar command.

2. Select the team whose staff you wish to edit from the Select Team dialog box and click the OK button.

3. Select the position you want to edit from the Select Position in Team dialog box and click OK. The Staff Assignment Add/Edit form appears.

4. To inactivate the current assignment, click the INACTIVATE button **or** click the right mouse button and select "Inactivate Current Member" **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Edit the effective date and status reason fields, if necessary. Click the SAVE button.

5. To assign a new staff member, click the ASSIGN button **or** click the right mouse button and select "Assign Member" **or** choose the EDIT|ASSIGN MEMBER menu bar command.

6. The Staff Lookup dialog box appears. Type the staff member name (last,first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected.

7. Edit the effective date and status reason fields, if necessary. Click the SAVE button. Close the form.

STAFF ASSIGNMENT

(For positions that ARE part of a preceptor link)

These steps cover editing where a staff member has already been assigned to a position that is part of a preceptor link. If you are initially assigning a staff member to a position, see "Assign Staff Member to a Position (For positions that ARE part of a preceptor link)" under Team Setup.

1. Select the TEAM|POSITIONS menu bar command.

2. Select the team whose staff you wish to edit from the Select Team dialog box and click the OK button.

3. Select the position you want to edit from the Primary Care Team Position Setup form and click OK. The Staff Assignment Add/Edit form appears.

4. To inactivate the current assignment, click the INACTIVATE button **or** click the right mouse button and select "Inactivate Current Member" **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Edit the effective date and status reason fields, if necessary. Click the SAVE button. If you inactivate a staff assignment for a position that is a current preceptor for another position and attempt to close the Staff Assignment Add/Edit form without creating a current staff assignment, your inactivation change will not be saved.

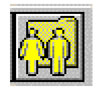
5. To assign a new staff member, click the ASSIGN button **or** click the right mouse button and select "Assign Member" **or** choose the EDIT|ASSIGN MEMBER menu bar command.

6. The Staff Lookup dialog box appears. Type the staff member name (last,first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected. Staff members currently assigned to a preceptor or precepted positions on the team may not be selectable depending on the type of position to which an assignment is being made.

7. Edit the effective date and status reason fields, if necessary. Click the SAVE button. Close the form.

SINGLE PATIENT ASSIGNMENT

These steps cover editing where a patient has already been assigned to a team and/or position. If you are initially assigning a patient to a team/position, see "Assign Single Patient to Team/Position(s)" under Team Setup.

1. Click on the Assign Patients toolbar speedbutton  or select the PATIENT|PATIENT ASSIGNMENT menu bar command.

2. The Patient Lookup dialog box appears. Type the patient name (last,first) and click the SEARCH button. If there is more than one match, possible matches will appear in the list box. Double click your selection **or** single click then click the SELECT button.

3. The Select Patient-Team Assignment form appears. Based on whether or not the SHOW ALL TEAM ASSIGNMENTS menu bar command is selected, all team assignments or only current assignments will appear in the list box. An asterisk in the PC column indicates the primary care team for this patient. If the patient is assigned to more than one team, click on the team for which you wish to edit patient assignment. Click the EDIT TEAM button.

4. **Team Assignment -** If necessary, edit the primary care team and restrict consults fields on the Team Assignment tab and click the SAVE button. To discharge a patient from a team, enter the date of discharge. Tab off the field and click the SAVE button. If the patient is assigned to positions on the team, the Review Active Positions dialog box will now appear. Clicking the DISCHARGE button will automatically enter the same discharge date for the associated active positions. Clicking the CANCEL button will cause the just entered date of discharge to be deleted. This action prevents patients being actively assigned to a position without having a team assignment

SINGLE PATIENT ASSIGNMENT

5. Position Assignment - To unassign an existing position assignment, double click on the position on the Position Assignment tab. The Position Information dialog box appears. Enter the unassigned date and click OK. Click the SAVE button. (History for this position assignment will remain.)

NOTE: If a patient has been assigned to a position in error (data entry error), the following steps should be taken. Click on the position. Select the EDIT|POSITION ASSIGNMENT|DELETE menu bar command. Confirm the deletion by clicking the OK button. You must hold the SC PCMM DELETE security key to perform this action. (History for this position assignment will be deleted.)

Creating Autolinks

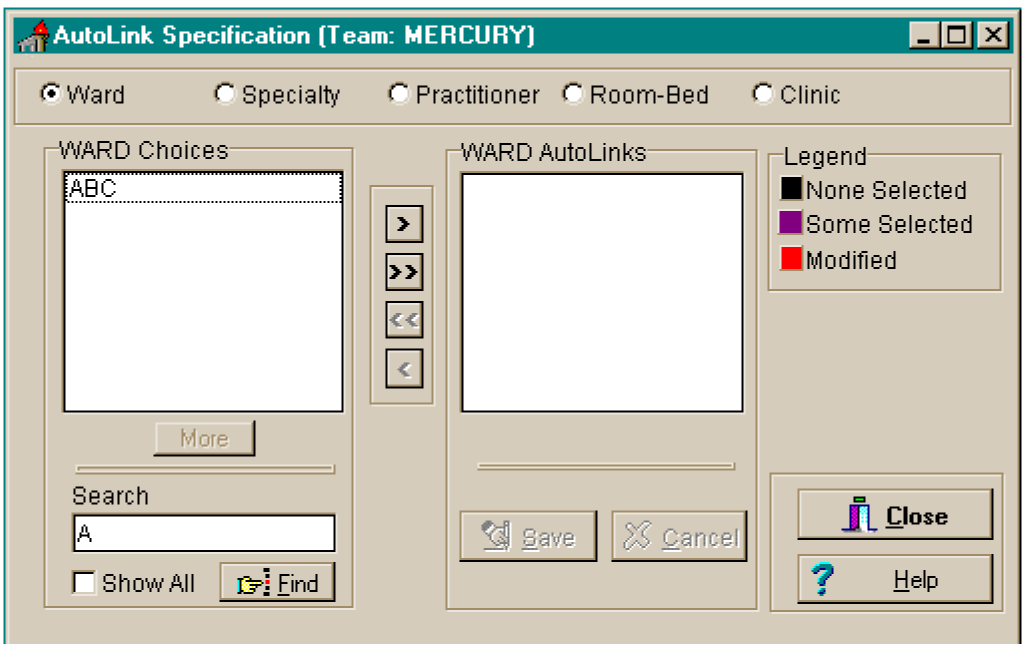
(This functionality has been disabled.)

If you have clicked on the Autolinks button on the General Tab of the Primary Care Team Profile form, begin at Step 3.

1. Select the TEAM|TEAM AUTOLINKS menu bar command.

2. Select a team through the Select Team Dialog Box.

3. The AutoLink Specification form appears. Choose the type of autolink from along the top of the form.



4. The *Choices* list box displays the entries for the selected item. You may click the SHOW ALL button to display all possible entries **or** type a few characters in the SEARCH box and click the FIND button for a limited selection. When first opened, the boxes default to A.

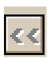
(This functionality has been disabled.)

5. Move your selections from the *Choices* list box to the *AutoLinks* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the arrow buttons

Moves the selected items from the *Choices* list box to the *Autolinks* list box.

Moves all the items currently in the *Choices* list box to the *Autolinks* list box.



Moves all the items currently in the *Autolinks* list box to the *Choices* list box.

Moves the selected items from the *Autolinks* list box to the *Choices* list box.

6. Click the SAVE button to create the autolinks. (You may save after establishing the autolinks for each individual item or wait until links are established for all items.)

7. Repeat steps 3 through 6 for each autolink type.

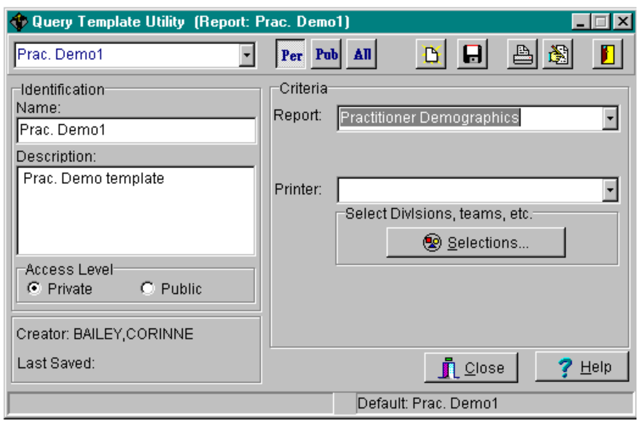
NOTE: To obtain link detail information on an entry, click on the entry from one of the list boxes. Right mouse click and choose "Details".

Reports

QUERY TEMPLATE UTILITY

The Query Template Utility is used to create report templates with a specified sort sequence and with specified category selections (divisions, teams, etc.). Templates may then be used to print the report in the future without having to make sort selections and category selections each time.

- Select REPORTS|SELECT REPORT menu bar command. The Query Template Utility form appears.



- Click the desired category button at top of form **or** choose the TEMPLATE|OPEN menu bar command to display the desired template type(s) in the drop down list.

Per (Personal) - your templates only
Pub (Public) - public templates only
All - both your personal and all public templates

QUERY TEMPLATE UTILITY

Create a New Template

1. Click the Create a New Template toolbar speedbutton  on the Query Template Utility form or choose the TEMPLATE|NEW menu bar command.

2. Edit the Name text box and enter a description.

3. Assign either Private or Public access level to the template by clicking the correct radio button.

4. Enter the report criteria.

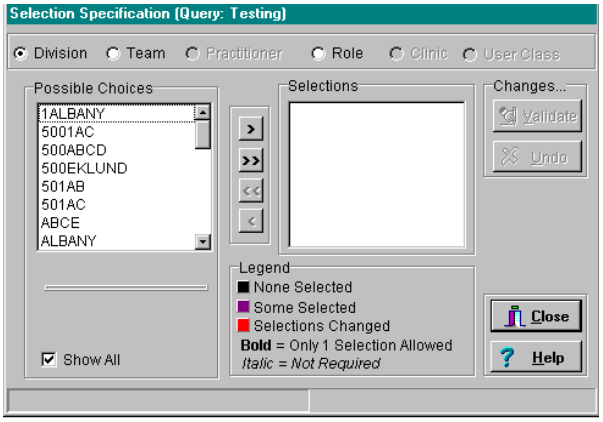
- Select the Report from the drop down list.
- If the Sort field is disabled, the default sort values will be used. If the Sort field is enabled, select the desired sort from the drop down list.
- Select the printer from the drop down list.
- In addition to the Sort and Printer fields, some reports have other unique data fields. These fields will appear below the Selections button on the form. (See Report Descriptions for a description of each available PCMM report and any unique fields.)

5. Click the Selections Button and enter the report specifications (divisions, teams, etc.). (*See Create a New Template - Report Specifications*). To obtain selection detail information on an entry, click on the entry from either of the list boxes. Right mouse click and choose “Details”.

6. If you wish to save this template after you have made and validated your selections, click the Save Template Changes toolbar speedbutton or choose the TEMPLATE|SAVE menu bar command.

QUERY TEMPLATE UTILITY

Create a New Template - Report Specifications



1. Choose the category along the top of the form for which you wish to select report specifications.

2. The *Possible Choices* list box displays the entries for the selected item. When first opened, the SHOW ALL field is checked which displays all possible entries. For a limited selection of entries, click the SHOW ALL check box to display the SEARCH box. Type a few characters in the SEARCH box and click the FIND button.

NOTE: If you have selected the Practitioner Demographics report, this form will appear differently. Since only one practitioner may be selected, the double arrow buttons are not visible. The SEARCH box appears instead of the SHOW ALL check box.

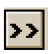
QUERY TEMPLATE UTILITY

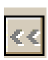
Create a New Template - Report Specifications

3. Move your selections from the *Possible Choices* list box to the *Selections* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the arrow buttons


Moves the selected items from the *Possible Choices* list box to the *Selections* list box.


Moves all the items currently in the *Possible Choices* list box to the *Selections* list box.


Moves all the items currently in the *Selections* list box to the *Possible Choices* list box.


Moves the selected items from the *Selections* list box to the *Possible Choices* list box.

4. Repeat Steps 1 to 3 for each category.

5. Click the Validate button. The validation action checks the relationships between the category selections (teams associated with correct division, clinics associated with correct division, etc.). If validation cannot be made, you will receive an Error Report explaining the inconsistency. Close the form.

Modify an Existing Template

1. Select REPORTS|SELECT REPORT menu bar command.

2. Select the template name from the drop down list.

3. Edit the report criteria.

4. Click the Selections button and edit the report specifications (divisions, teams, ect.). Be sure to validate your selections when complete. Close the form.

5. If you wish to save this template, click the Save Template Changes toolbar speedbutton or choose the TEMPLATE|SAVE menu bar command.

QUERY TEMPLATE UTILITY

Printing Reports

Reports cannot be printed to the screen using the graphical user interface. They must be sent to a printer. These same reports may be printed to both the screen and to a printer through the Scheduling software.

To print a report from a template

1. Select the REPORTS|SELECT REPORTS menu bar command to open the Query Template Utility form.

2. Select the template name from the drop down list.

3. Click the Print Report toolbar speedbutton **or** choose the TEMPLATE|PRINT menu bar command.

4. If the Report Print dialog box appears, select the printer from the drop down list and click OK.

To print a report not set up in a template

1. Select the REPORTS|SELECT REPORTS menu bar command to open the Query Template Utility form.

2. Click the Create a New Template toolbar speedbutton.

3. Select the report name and report criteria (sort, printer, etc.).

4. Click the Selections button and choose the report specifications. Be sure to validate your selections when complete. Close the form.

5. Click the Print Report toolbar speedbutton **or** choose the TEMPLATE|PRINT menu bar command.

6. If the Report Print dialog box appears, select the printer from the drop down list and click OK.

QUERY TEMPLATE UTILITY

Template Menu Bar Commands

Restore
Will restore the selected template values to what they were at the time of the last save.

Save As
Use the Save As function to save an existing query under a different name.
- Select the template name from the drop down list.
- Select the *Save As* menu bar command and rename the template. Change the description if desired.
- Follow steps 3 through 5 under Modify an Existing Template.

Set Default
To set a template as your default value, select the template name from the drop down list and click the Set your Default Template to Current toolbar speedbutton **or** choose the *Set Default* menu bar command.

Delete
To delete an existing template, select the template name from the drop down list. Select the *Delete* menu bar command. Click OK.

REPORTS DESCRIPTIONS

Below is a description of each available PCMM GUI report and any unique fields (shown in italics). For more detailed information on the reports, see PCMM Reports in the PIMS Scheduling User Manual.

Detailed Patient Assignments

Lists patients and the clinics in which they are enrolled. May be used prior to team/position assignments in order to help validate clinic enrollments.

Team Assignment - List/Don't List patients assigned to primary care.

Individual Team Profile

Displays basic team definition information.

Patient Listing for Team Assignments

Lists patients along with selected team information.

Practitioner Demographics

Displays administrative information for a chosen practitioner. Can only select one practitioner per report.

Practitioner's Patients

Identifies the size and constituents of a practitioner's patient panel.

Summary Only - Check to only print totals on the report.

Summary Listing of Teams

Reports the number of patients assigned for each practitioner currently assigned to the team.

Team Member Listing

Shows basic information on the team and member practitioners. May be used to review which practitioners were assigned to a team during a certain time period.

Data Range - Print the report for this date range.

Team Patient Listing

Lists a team's patients and the clinics in which they are enrolled.

Stand-alone Options

This section includes the option documentation for the Mass Team/Position Unassignment option and the Patient Team Position Assignment Review option. These options are not distributed as part of any existing menu. They are intended for IRM or select ADPAC personnel.

Mass Team/Position Unassignment

Introduction

The Mass Team/Position Unassignment option can be used to unassign a large number of patients from an active team or an active position using the List Manager functionality. It is recommended that distribution of this option be limited.

The effective date you choose for the unassignment may be in the past, today, or in the future. The list of patients displayed contains all patients with assignments to the selected team/position, as of the selected effective date or after the effective date. Those with assignment dates in the future will show an asterisk (*) next to the assigned date.

When patients are unassigned from the team, they are also automatically unassigned from any associated position. If a position is associated with a clinic, you are given the opportunity to also discharge patients from the clinic.

The following is an explanation of the actions available.

SA Select all patients on the list
DA Deselect all patients on the list
SP Select individual patients
DP Deselect individual patients
VA List all patients. Those selected will show a YES in the Selected column.
VS Only list patient that have been selected
VD Only list patients that have not been selected
UN Will queue the unassignment process after you say you want to continue

Mass Team/Position Unassignment

Introduction

After you have selected the patients, choose the Unassign Patients action. A summary of the unassignments that will occur is displayed. You are then asked if you are sure you want to continue. A YES response immediately queues the unassignment process and the Task # is displayed. A NO response returns the screen to where it was before the Unassign Patients action was entered.

A confirmation MailMan message is generated from the utilization of the unassign action. It contains the team name and the effective date of the unassignment. The "Entry#" (shown for errors and for future assignments that are deleted) is the internal entry number of the deleted entry. It comes from the PATIENT TEAM ASSIGNMENT file (#404.42) or the PATIENT TEAM POSITION ASSIGNMENT file (#404.43). The following applicable information is also contained in the mail message.

Patients Processed
Lists number of patients unassigned, number still assigned due to error, total patients, and any associated clinic discharges.

Clinic Discharges
Lists any associated clinic discharges. The position and associated clinic are displayed.

Error List
Lists those patients still assigned and the reason why.

Unassigned List
Lists those patients unassigned and, for team unassignment, unassignments which were automatically made from associated positions.

Mass Team/Position Unassignment

Example

```
Select Type of Mass Unassignment: Team// <RET>
Effective Date: T-1// <RET>   (AUG 05, 1998)
Select TEAM NAME: LIDSTER


>>> Checking to see if any team positions are associated with clinics...
----------------------------------------------------------------------------
             Team             : LIDSTER
             Position         : PHYSICIAN-ATTENDING
             Associated Clinic: 0RTHO

>>> Do you want to discharge patients from this clinic? (Yes/No) Y   YES


...SORRY, THIS MAY TAKE A FEW MOMENTS...


Mass Team Unassignment          Aug 06, 1998 08:07:09      Page:    1 of    1
    Team: LIDSTER                            Total: 6  Selected: 0

Proposed Effective Date: 08/05/1998          View: ALL
         Selected  Patient Name        ID             Assigned     Unassigned
1                  JONES,FRED          006-89-0909    08/12/97
2                  PATCH,ELLIE         009-12-4321    04/30/97
3                  POLLSON,JOHN        123-00-9899    01/16/98
4                  RAYMOND,GENE        124-87-2290    09/22/97
5                  SULLIVAN,JAMES      078-33-4122    05/04/98
6                  YOUNG,WENDELL       083-44-5634   *08/24/98


          * Future Date
SA  Select All            DP  DeSelect Patients     VD  View DeSelected
DA  DeSelect All          VA  View All              UN  Unassign Patients
SP  Select Patients       VS  View Selected         QU  Quit
Select Action: Quit// SA   Select All

...EXCUSE ME, JUST A MOMENT PLEASE...
```

Mass Team/Position Unassignment

Example

```
Mass Team Unassignment          Aug 06, 1998 08:07:09      Page:    1 of    1
    Team: LIDSTER                            Total: 6  Selected: 0

Proposed Effective Date: 08/05/1998           View: ALL
         Selected  Patient Name        ID              Assigned     Unassigned
1           Yes    JONES,FRED          006-89-0909     08/12/97
2           Yes    PATCH,ELLIE         009-12-4321     04/30/97
3           Yes    POLLSON,JOHN        123-00-9899     01/16/98
4           Yes    RAYMOND,GENE        124-87-2290     09/22/97
5           Yes    SULLIVAN,JAMES      078-33-4122     05/04/98
6           Yes    YOUNG,WENDELL       083-44-5634    *08/24/98


          * Future Date
SA  Select All          DP  DeSelect Patients     VD  View DeSelected
DA  DeSelect All        VA  View All              UN  Unassign Patients
SP  Select Patients     VS  View Selected         QU  Quit
Select Action: Quit// UN   Unassign Patients



----------------------------------------------------------------------------
                      Team Unassignment Definition
----------------------------------------------------------------------------
    Team             : LIDSTER
    Effective Date   : 08/10/1998
    # of Patients    : 6

    Clinic Discharges:    Position                 Associated Clinic
                          --------                 -----------------
                          PHYSICIAN-ATTENDING      ORTHO

Are you sure you want to continue? No// YES

Task#: 5692

Enter RETURN to continue: <RET>
```

Mass Team/Position Unassignment

Example

Example of MailMan Message

```
Subj: Mass Team Unassignment Information  [#68602] 06 Aug 98 08:07  35 Lines
From: POSTMASTER (Sender: BAILEY,CURTIS)  in 'IN' basket.   Page 1  **NEW**
-----------------------------------------------------------------------------

Mass Team Unassignment has been completed.

             Team: LIDSTER
             User: POSTMASTER
   Effective Date: 08/06/1998

 Patients Processed
   Unassigned     : 6
   Errors/Warnings: 0    (still assigned)
   Total          : 6

Clinic Discharges:   Position                      Associated Clinic
                     --------                      -----------------
                     PHYSICIAN-ATTENDING           ORTHO

 Error List:
 ===========
    No errors to report.


 Unassigned List:
 ================
 Patient                           ID
 -------                           --
 JONES,FRED                        006-89-0909
 PATCH,ELLIE                       009-12-4321
     >>> Position assignment to PHYSICIAN1 was unassigned.
     >>> Position assignment to NURSE was unassigned
 POLLSON,JOHN                      123-00-9899
     >>> Position assignment to PHYSICIAN-ATTENDING was unassigned.
         >>> Discharged from ‘ORTHO’ clinic
 RAYMOND,GENE                      124-87-2290
     >>> Position assignment to PHYSICIAN1 was unassigned.
     >>> Position assignment to NURSE was unassigned
 SULLIVAN,JAMES                    078-33-4122
     >>> Position assignment to PHYSICIAN1 was unassigned.
 YOUNG,WENDELL                     083-44-5634
     >>> Future team assignment deleted.
         Assignment Date: 08/24/98   Entry#: 3874
     >>> Position assignment to PHYSICIAN1:
         >>> Future position assignment deleted.
             Assignment Date: 08/24/98   Entry#: 2447


Select MESSAGE Action: IGNORE (in IN basket)//
```

Patient Team Position Assignment Review

Introduction

The Patient Team Position Assignment Review option makes a comparison of the entries in the PATIENT TEAM POSITION ASSIGNMENT file (#404.43) and the PATIENT TEAM ASSIGNMENT file (#404.42). It checks that the position assignment active timeframe is within the team assignment active timeframe. The current PCMM software is designed to prevent timeframe discrepancies. However, older versions of PCMM did allow these timeframe problems to occur. This report has been designed to help sites identify these problem assignments.

The report is in the form of a mail message and lists those position assignments that fall outside the team assignment active timeframe. Each entry in the mail message will display team name, position, patient name, error, position assigned/unassigned date, and team assigned/unassigned date.

You may correct timeframe discrepancies using the PCMM GUI as follows.

- From the Patient drop down menu, make sure *Show All Team Assignments* is checked.
- From the Patient drop down menu, select *Patient Assignments.*
- Enter the patient name.
- The Select Patient-Team Assignment dialog box appears. Double click on the problem Team Assignment.
- The Team-Position Assignments dialog box appears. Make note of the discharged date on the Team Assignment tab. Click on the Position Assignments tab. Double click on the problem Position Assignment.
- Enter the discharged date from above as the Unassigned Date.

Example

```
Select Team: ALL// BLUE
Select another Team: RED
Select another Team: <RET>

>>> Task#: 388578

    This task will send a MailMan message to you containing
    the results of the position assignment review.

>>> Press RETURN to continue: <RET>
```

Patient Team Position Assignment Review

Example

```
Subj: Patient Team Position Assignment Review  [#70086] 04 Sep 98 10:41  32 Lines
From: POSTMASTER (Sender: BURNS,JEROME)    in 'IN' basket.   Page 1  **NEW**
------------------------------------------------------------------------------

In order to correct the following active positions with discharged team
assignments, please refer to the documentation for the Patient Team Position
Assignment Review option found in the Stand-alone Options Section of the
PCMM User Guide.


   Teams Reviewed:
       BLUE
       RED


   Patient Team Position Assignments Reviewed:     12
   Number of Assignments with Problems       :      3  ( 25.00%)

 =============================================================================
 Team: BLUE                 Position: PRIMARY CARE PHYSICIAN
         Patient: BAILEY,GEORGE B (1010)
           Error: Position Assigned Date is BEFORE Team Assigned Date
                    Position Assigned Date: 04/25/1996
                        Team Assigned Date: 04/28/1996
 -----------------------------------------------------------------------------
 Team: BLUE                 Position: PRIMARY CARE PHYSICIAN
         Patient: SMITH,ALICE (0144)
           Error: Position Assigned Date is BEFORE Team Assigned Date
                    Position Assigned Date: 08/28/1998
                        Team Assigned Date: 08/30/1998
 -----------------------------------------------------------------------------
 Team: RED                  Position: PHYSICIAN
         Patient: KILMIRE,MICHAEL J (7964)
           Error: Position Unassigned Date is AFTER Team Unassigned Date
                         Team Unassigned Date: 04/01/1997
                     Position Unassigned Date: 07/09/1997
 -----------------------------------------------------------------------------


Select MESSAGE Action: IGNORE (in IN basket)//
```

Windows Conventions

STANDARD WINDOWS OBJECTS

These are the types of data entry fields located in standard windows forms.

Check Box

Toggles between a YES/NO, ON/OFF setting. Usually a square box containing a check mark or *x*. Clicking the box or pressing the spacebar toggles the check box setting.

Command Button

The Command button initiates an action. It is a rectangular box with a label that specifies what the button does. Command buttons that end with three dots indicate that a subsidiary screen may be evoked by selecting the command.

Date Field

Identified by “__/__/__” or a date “mm/dd/yy”. Will usually have an associated popup calendar. Double clicking with the mouse inside the date edit box, or tabbing to the edit box and then pressing the F2 key, displays the calendar. Clicking on the desired date, or using the arrow keys to move to a date and then pressing the spacebar, selects the date. Each component of the date (month/day/year) must consist of two characters (i.e., 02/02/96). The selected entry will not be effective until you tab off or exit from the date field.

Drop Down List

A list box containing an arrow button on the right side which displays one entry at a time. Choose from a vertical list of choices. Select the entry you want by clicking the list entry. You cannot type in this box, only select an item from the list. Once an entry is selected, it cannot be deleted - only changed. If <None> is the last entry, selecting it will clear the list entry. If <More> is the last entry, selecting it will display additional entries. The selected entry will not be effective until you tab off or exit from the drop down list.

F2 Key

Where there is an additional action which may be taken on a field, pressing the F2 key will initiate that action.

STANDARD WINDOWS OBJECTS

Faded Background
Fields that appear with a faded background are currently disabled.

List Box
Box which shows a list of items. If more items exist than can be seen in the box, a scroll bar appears on the side of the box. Selecting an entry from a list box requires either double clicking the entry or single clicking the entry and pressing the spacebar.

Lookup Box
Choose from a vertical list of choices. By typing in a few characters and pressing the ENTER or TAB key, a list of matching entries drops down. Select the entry you want by clicking the list entry. Entering a question mark and then pressing ENTER or TAB, or clicking the down arrow on an empty edit field, gives a complete listing of available entries. If <More> is the last entry, selecting it will display additional entries.

Memo Field
This field is equivalent to a word-processing field.

Non-White Background
Items in fields that appear with a non-white background can be selected but cannot be modified directly in that field.

Radio Button
Radio buttons appear in sets. Each button represents a single choice and normally only one button may be selected at any one time. For example, MALE or FEMALE may be offered as choices through two radio buttons. Click in the button to select it.

Right Mouse Button or Shift F10
You may click the right mouse button or press Shift F10 for a popup box of menu items.

Tab Key
Use the TAB key or the mouse to move between fields. Do not use the RETURN key. The RETURN key is usually reserved for the default command button or action (except in menu fields).

STANDARD WINDOWS OBJECTS

Text Box

Type the desired characters into the edit box. The selected entry will not be effective until you tab off or exit from the text box.

FORM BUTTONS

Buttons which appear on tab pages apply only to that tab and not the entire form. If there are action buttons on both the tab page and the form, the tab button should normally be clicked first.

Add

Anytime you reach a screen and the ADD button is enabled, you must first click the ADD button before entering any information.

Assign

Used to assign a staff member, patient, or preceptor to a position.

Autolinks - *(This functionality has been disabled.)*

Opens the Autolinks form used to establish linkages between a team and wards/beds/clinics/practitioners, etc. (for OE/RR).

Cancel

Cancels the latest entry (up until the OK or SAVE button is clicked).

Close

Closes the window. If there are any changes that have not been saved, you will get a confirmation message asking you if you want to continue without saving; save before exiting; or cancel the close action and return to the window.

Edit

Used to edit position information.

Find

Used to quickly find an entry. Enter the search string and click the OK button

Help

Provides help for the area you are currently working in.

FORM BUTTONS

New
Used to open up a dialog box from which you can enter a new team or position.

OK
Adds the new entry after the data has been entered.

Positions
Opens the Primary Care Team Position Setup form. If the team has no active positions, the New Position dialog box will appear.

Preceptor
Opens the Preceptor Assignment Add/Edit form.

Save
Saves all changes made since the last save action. If you attempt to save and all required fields have not yet been completed, you will receive notification that the required fields must be completed before saving.

Search
After at least three characters are typed in a lookup dialog box, clicking the Search button will bring up matching entries.

Staff
Opens the Staff Assignment Add/Edit form.

Undo
Undoes all changes made since the last save action and redisplays the original data.

Troubleshooting Guide

Inconsistency Descriptions with Detailed Correction Instructions

1. Position with patient assignment has no staff assigned

Problem: Position exists with patients assigned to the Position, but no staff member is assigned to that Position.

Fix: Use PCMM GUI

Steps:

- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Active Team position
- Click on Staff button
- Click Assign button
- Enter name of staff member to assign to that position
- Change Effective Date if appropriate
- Click Save button

2. Patient on a Team designated PC has no PCP assigned

Problem: Patient is assigned to a Primary Care Team but has no Primary Care Practitioner assigned.

Fix: Use PCMM GUI

Steps:

- Click Patient pull down menu
- Click Patient pull down menu
- Select Patient Assignment
- Patient Lookup window opens
- Enter patient's name
- Patient – Team Assignment window opens
- Double-click team name
- Team – Position Assignments window opens
- Click on Position Assignments tab
- Click Assign button
- Double-click correct Position
- Position Information window opens
- Change Assigned Date if appropriate
- Click OK button
- Click Save button
- Close windows

Inconsistency Descriptions with Detailed Correction Instructions

Fix: Use **VistA** options

Steps:

- Select Appointment Management option
- Enter Patient name
- Select PC – PC Assign or Unassign action
- The following is displayed:
    1. POSITION ASSIGNMENT - BY PRACTITIONER NAME
    2. POSITION ASSIGNMENT - BY POSITION NAME
    3. TEAM UNASSIGNMENT

  Use either #1 or #2 to assign patient.
    - If you select #1: POSITION ASSIGNMENT - BY PRACTITIONER NAME
        - Position's Current PRACITIONER: (Enter Practitioner's name)

          Hint: Type ?? to see list of Practitioners for that Team.
        - Assignment Date: TODAY// (Press Return key)
        - Are you sure? (Yes/No)? (Enter YES)
        - Do you with to enroll the patient from the clinic on TODAY'S DATE?
        - Enter Yes or No: YES// (press Return key)
        - Clinic Enrollment made
        - Position Assignment made
    - If you select #2 POSITION ASSIGNMENT - BY POSITION NAME
        - POSITION's Name: (Enter the name of the Position)

          Hint: Type?? to see list of Positions & staff assigned to that Position for that Team.
        - Assignment Date: TODAY// (Press Return key)
        - Are you sure? (Yes/No)? (Enter YES)
        - Do you with to enroll the patient from the clinic on TODAY'S DATE?
        - Enter Yes or No: YES// (press Return key)
        - Clinic Enrollment made
        - Position Assignment made

Inconsistency Descriptions with Detailed Correction Instructions

3. Patient has multiple active PCP assigned

Problem: Patient has multiple active Primary Care Practitioner assigned.
Fix: Use PCMM GUI
Steps:

- Determine wish PCP assignment is correct
- Click Patient pull down menu
- Select Patient Assignment
- Patient Lookup window opens
- Enter patient's name
- Patient – Team Assignment window opens
- Double-click team name
- Team – Position Assignments window opens
- Click on Position Assignments tab
- Highlight the incorrect Position Assignment
- Click on Edit pull-down menu
- Select Position assignment
- Click on Delete
- Confirm window opens
- Click on Yes button
- Close windows

4. Patient's AP and PCP are the same

Problem: Associate Provider and Primary Care Provider is the same staff member.
Fix: Use PCMM GUI
Steps:

- Patient Drop down menu
- Make sure "Show All Team Assignments" is checked
- Do Not check under Team drop down menu
- "Active Only" as you will want all teams to show (active or inactive)
- Under Team, Click on speed positions setup button
- Select Team
- Primary Care Position Setup screen is displayed
- Click on one of the positions (AP or PCP)
- Click on the Staff button
- Click the Inactivate button
- Assign an effective date, status and reason

  > Hint: If the date of today is selected, it will not show off of the Inconsistency report until Midnight as assignment changes are valid until the end of the day.

- Close

Inconsistency Descriptions with Detailed Correction Instructions

5. AP is without a Preceptor

Problem: Associate Provider is not assigned a Preceptor.
Fix: Use PCMM GUI
Steps:
- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Active Team position
- Click on Preceptor button
- Preceptor Assignment Add/Edit window opens
- Click Assign button
- Select Preceptor Position window opens
- Double click correct Preceptor
- Change Effective Date if appropriate
- Click Save
- Close windows

6. AP position is not designated for PC

Problem: Associate Provider is not listed as Can Provide Primary Care.
Fix: Use PCMM GUI
Steps:
- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Active Team position
- Click Settings Tab
- Click Can Provide Primary Care checkbox
- Click Save button
- Close windows

7. PCP position is not designated for PC

Problem: Primary Care Provider position is not listed as Can Provide Primary Care.
Fix: Use PCMM GUI
Steps:
- Click Team pull down menu
- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Active Team position
- Click Settings Tab
- Click Can Provide Primary Care checkbox
- Click Save button
- Close windows

Inconsistency Descriptions with Detailed Correction Instructions

8. Active position assignment with inactive Team Assignment/Team/Position

Problem: An active Position assignment is associated with an inactive Team.
Fix: Use PCMM GUI
Steps:

- **Determine if Team should be inactive -If YES**
- In order to correct this problem, the Team must be made active so that the patients assigned to this Team can be deleted and the Team made inactive again.
    - Click Team pull down menu
    - Click on Active only from pull down menu
    - Click Team pull down menu
    - Select Setup
    - Double Click on correct Team name
    - Click on History Tab
    - Click Add button
    - Change Effective Date if appropriate
    - Click on Reason down arrow
    - Select a reason from the drop down list
    - Click OK button
    - Click Close button
    - The Team is now active
    - (steps necessary to delete patients assigned to this Team)
    - Click Patient pull down menu
    - Select Patient Assignments
    - Patient Lookup window opens
    - Enter Patient name
    - Double click patient name
    - Select Patient – Team Assignment window opens
    - Double click Team
    - Click Position Assignments tab
    - Highlight correct Position Assignment
    - Click on Edit pull down menu
    - Select Position Assignment from pull down menu
    - Click on Delete from pull down menu
    - Confirm Window opens
    - Click Yes button
    - Close window
    - Make sure correct Team is highlighted
    - Click Assignments pull down menu
    - Select Delete from a Team from the pull down menu
    - Confirm Window opens
    - Click Yes button
    - Close window
    - (Repeat steps for each patient assigned to this Team)
    - (steps necessary to make Team inactive)
    - Click Team pull down menu
    - Click on Active only from pull down menu
    - Click Team pull down menu

Inconsistency Descriptions with Detailed Correction Instructions

- Select Setup
- Double Click on correct Team name
- Click on History Tab
- Click Add button
- Change Effective Date if appropriate
- Click on Reason down arrow
- Select a reason from the drop down list
- Click OK button
- Click Close button
- The Team is now inactive

Steps:
- **Determine if Team should be inactive - If NO**
- The Team should not be inactive. You need to make this Team active. Follow these steps necessary to make a Team active:
  - Click Team pull down menu
  - Click Team pull down menu
  - Click on Active only from pull down menu
  - Click Team pull down menu
  - Select Setup
  - Double Click on correct Team name
  - Click on History Tab
  - Click Add button
  - Change Effective Date if appropriate
  - Click on Reason down arrow
  - Select a reason from the drop down list
  - Click OK button
  - Click Close button
  - The Team is now active

Inconsistency Descriptions with Detailed Correction Instructions

9. Active position Assignment with Inactive Team Assignment/Team/Position

Problem: An active Position assignment is associated with an inactive Position.
Fix: Use PCMM GUI
Steps:

- **Determine if Position should be inactive - If YES**
- In order to correct this problem, the Position must be made active so that the patients assigned to this Position can be deleted and the Position made inactive again.
    - (The following steps are necessary to make position active.)
    - Click Team pull down menu
    - Select Positions
    - Double Click on correct Team name
    - Team Position Setup window opens
    - Click All Positions radio button to see All Positions (active and inactive)
    - Click on correct Team position
    - Click on History Tab
    - Click Add button
    - Change Effective Date if appropriate
    - Click on Reason down arrow
    - Select a reason from the drop down list
    - Click OK button
    - Click Close button
    - (The following steps necessary to delete patients assigned to this position)
    - Click Patient pull down menu
    - Select Patient Assignments
    - Patient Lookup window opens
    - Enter Patient name
    - Double click patient name
    - Select Patient – Team Assignment window opens
    - Double click Team
    - Click Position Assignments tab
    - Highlight correct Position Assignment
    - Click on Edit pull down menu
    - Select Position Assignment from pull down menu
    - Click on Delete from pull down menu
    - Confirm Window opens
    - Click Yes button
    - Close window
    - (Repeat steps for each patient assigned to this position)
    - (The following steps necessary to make position inactive)
    - Click Team pull down menu
    - Select Positions
    - Double Click on correct Team name
    - Team Position Setup window opens
    - Click on correct Team position
    - Click on History Tab
    - Click Add button
    - Change Effective Date if appropriate

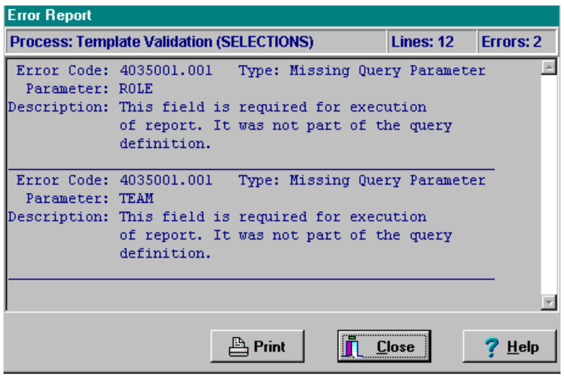
Inconsistency Descriptions with Detailed Correction Instructions

- Click on Reason down arrow
- Select a reason from the drop down list
- Click OK button
- Click Close button
- Now the Position is inactive

Steps:
- **Determine if Position should be inactive - If NO**
- You need to make this Position active.
  - (The following steps are necessary to make position active.)
  - Click Team pull down menu
  - Select Positions
  - Double Click on correct Team name
  - Team Position Setup window opens
  - Click on correct Team position
  - Click on History Tab
  - Click Add button
  - Change Effective Date if appropriate
  - Click on Reason down arrow
  - Select a reason from the drop down list
  - Click OK button
  - Click Close button
  - Now the Position is active

Error Report Window

Below is an example of the Error Report Window which may appear if a specified action cannot be processed. A description of the error will appear in the window. You may print the error message. It will print to a windows device and not a **V***IST***A** device.



Process - Shows what action was being taken at the time of the error.

Lines - Number of lines in the error message.

Errors - Number of errors being reported in the error message.

PCMM Business Rules

The PCMM "business rules" provide information on how some of the PCMM fields will be handled for team, team positions, and patient assignments. These rules are not intended to be all encompassing, but for general information purposes to allow some basic checking within the system to ensure data integrity.

A. Primary Care Team Business Rules

A Primary Care Provider is a Staff Physician, Physician Assistant, Nurse Practitioner.
An Associate Provider is a Resident, and can be a Physician Assistant and a Nurse Practitioner.

- A patient cannot have more than one primary care provider.
- A primary care provider is authorized to provide primary care and can act as a preceptor. A preceptor is a primary care provider who oversees the activities of an associate provider. The preceptor is the ultimate responsible person for the patient care provided.
- An associate provider is authorized to provide primary care, but cannot act as a preceptor.
- A staff physician is never an associate provider.
- A physician assistant (PA) and nurse practitioner (NP) can be either the primary care provider (PCP) or an associate provider (AP). However, they cannot be both for the same patient.
- An associate provider cannot be the primary care provider.
- An associate provider must have a preceptor link to a primary care provider. An associate provider is not authorized to act on his/her own.
- If a position has a preceptor assigned, that position cannot be a primary care provider or precept over another position. But this position can and should be marked "can provide primary care".
- If a position is marked as "can provide primary care", the preceptor assigned to this position must also have "can provide primary care" marked.
- Primary care patient assignment cannot be made to an associate provider who does not have a preceptor assigned.
- If "can act as preceptor on Primary Care Team" is marked, then "can provide primary care" must also be marked.
- In order to be a preceptor on a primary care team, the provider must be able to provide primary care.
- Establishing a preceptor link will report the associate provider and the primary care provider as active staff members in those positions.

- When attempting to remove a primary care provider (preceptor) link from an associate provider, the software will check for patient assignments. If there are patient assignments, the user will not be allowed to leave the preceptor link empty (blank). If there are no patient assignments, the preceptor link may be removed. Once a preceptor link is removed, the associate provider doesn't become the primary care provider, as the associate provider is not authorized to be the primary care provider
- Assignments are valid until the end of a day. This allows for the enforcement of the rule that a patient cannot have more than one primary care provider on a given day. (TIP: If you want to inactivate an assignment immediately, assign an inactive date of yesterday.)

B. Team Setup

- Required information for team setup includes team name, purpose, service, and institution. Additional data fields are optional and further define the team (phone no., description, default team printer, primary care team restrict consults, team closed, auto-assign to team from clinic, auto-discharge from team from clinic, team assignments allowed.)
- The team name can be changed, but it must be a unique entry. Any name entered to replace an existing team name will be checked. If there is already a team with that name, whether active or inactive, replacement will not be allowed. You will be asked to confirm all name changes.
- The deletion of any team is not permitted once a history entry has been established. Once a team is in use, you may inactivate it, but not delete it. If you attempt to delete, you will be given the warning message "The following conditions prevent deletion: History entries are entered".

C. Team History

- When adding a new entry to the team history, the effective date, status, and reason for the entry must be completed before the entry can be saved.
- When adding a new entry, the effective date for the new entry cannot be earlier than a previous entry in the history. For example, a new entry that would reactivate a team that was inactivated on September 1, could not have a date earlier than September 1.
- You cannot have two consecutive entries of the same status.
- You can only delete the latest date entry in the history list. Once another entry has been made which supersedes a previous entry, that entry can no longer be deleted.
- The date for an existing entry can only be changed if it does not conflict with any of the other entries in the history. Since there may be other packages using this data in the future, changing a date could cause potential problems. Date changing should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The "reason" for any history entry can be changed.
- The status cannot be changed for an existing entry. There are only two status values, active and inactive.
- In order for a team to be inactivated, all positions and staff assignments must be inactivated.

D. Team Position Setup

- General required information for position setup includes position, role, and message notifications. Additional data fields are optional and further define team purpose (description, beeper, can provide primary care, can act as a preceptor, associated clinic, and number of patients allowed for position).
- See the Primary Care Team Business Rules concerning associate provider and positions that can act as a preceptor on a primary care team.
- The position name can be changed, but it must be a unique entry within the team. You can use the same name for any number of different teams, but not within the same team. Any name entered to replace an existing name will be checked. If there is already a position with that name within the team, whether active or inactive, replacement will not be allowed. You will be asked to confirm all name changes.
- The deletion of any position is not permitted.
- If a position is created in error, you will be able to remove it up until you assign a patient to it, or change its current status. Once a position is in use, you may inactivate it, but not delete it.

E. Team Position History

- When adding a new entry to the team position history, the effective date, status, and reason for the entry must be completed before the entry can be saved.
- When adding a new entry, the effective date for the new entry cannot be earlier than a previous entry in the history. For example, a new entry that would reactivate a position that was inactivated on September 1, could not have a date earlier than September 1.
- You cannot have two consecutive entries with the same status.
- If you inactivate a position and there is a staff member currently active in the position, a warning message will display stating that the Team Member is Active in Position.
- You can only delete the latest (last) history entry. Once another entry has been made which supersedes a previous entry, that entry can no longer be deleted.
- The date for an existing entry can only be changed if it does not conflict with any of the other entries in the history. Since there may be other packages using this data in the future, changing a date could cause potential problems. Date changing should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The “reason” for any history entry can be changed.

F. Team Position Staff History

- Only one staff member can be assigned to a position at any given time.
- If there already is an active staff member, you will only be allowed to inactivate the current staff member.
- The status cannot be changed for an existing entry. There are only two status values, active and inactive.
- When assigning a new staff member to a team position, the member's name, effective date, status, and reason for the assignment must be completed before the assignment can be entered.
- When adding a new staff member to a position, the effective date for the new assignment cannot be earlier than the inactivation date of the previous assignment.
- Only the last assignment entry can be deleted.
- The date for an existing assignment can only be changed only if it does not conflict with any of the other assignment entries. Since there may be other packages using this data in the future, changing a date could cause potential problems. Date changing should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The "reason" for any history entry could be changed.
- The "status reason" for an existing entry may be changed only if it is the latest assignment entry in the Assignment History log and has a status of inactive.

G. Patient Team Assignment

- The Inconsistency Report displays patients that are assigned to a primary care team without a position assignment. The assignments that are identified will require action.
- Only teams that have the "Primary Care Team" box checked on the Settings Tab of the Team Setup Screen may be assigned as a primary care team. **Note:** This field determines if a team can ever be a primary care team. The team's purpose does not affect the ability of a team to function as a primary care team.
- A patient can only be assigned to one primary care team on any given date.
- A patient can be assigned to more than one non-primary care team.
- In the Multiple Patient Assignments to a Team option, patients currently assigned to the destination team are not listed in the "Available to Assign" list as they are already assigned to that team.
- In the Multiple Patient Assignments to a Team option, if "Make this a Primary Care Team Assignment" is checked, patients who do not have a primary care team will be assigned this team as their primary care team. Patients who have already been assigned to another team as their primary care team will not be assigned to the team.

H. Patient Team Position Assignment

- In order for a position to be designated as the primary care practitioner position, the following conditions must exist:
  - the team must be able to provide primary care
  - the team must be designated as the patient's primary care team
  - the position must be able to provide primary care
  - the patient can have no other position designated as primary care practitioner.
- See the Primary Care Team Business Rules concerning associate provider and positions that can act a preceptor on a primary care team.
- A patient cannot have more than one primary care provider on any given date.
- Only positions from the patient's primary care team may serve as the primary care provider.
- In multiple patient assignment, the assignment will fail if the patient is already assigned to a primary care team or a primary care position.
- In multiple patient assignment, the assignment will fail if a death entry has been entered for the patient.
- In the Multiple Patient Assignments to a Position option, selected patients who have not yet been assigned to the position's team and are permitted to be assigned to the position (e.g., no conflicts with primary care assignments) will be assigned to the team at the same time.
- Assigning patients by using the Multiple Patient Assignment to a Position option automatically enrolls patients to the team that the position is assigned to.

I. Processing Team Reassignments

- Team reassignment must be made from a source team to a destination team.
- Team reassignment from a source team to a destination team can be made when the team exists now or in the future.

J. Processing Position Reassignments

- Position reassignment must be made from a source position to a destination position.

Glossary

ACOS	Associate Chief of Staff
ADMIN COORDINATOR	The administrative coordinator for Primary Care and Non-Primary Care Teams. This person is involved with administrative (MAS requirements and/or Clinic Administration) duties as well as oversight of the Scheduling process and Primary Care team definition.
ARROW	Arrow is a symbol (⇩ ⇧ ⇦ ⇨) that is used to scroll up and down lists, and left to right for moving objects (patient names, e.g.).
ASSOCIATE PROVIDER	An Associate Provider is authorized to provide primary care, but cannot act as a Primary Care Provider. In PCMM, a Resident is designated as an Associate Provider. A Nurse Practitioner and/or Physician Assistant may be designated as an Associate Provider also. Per VHA Directive every patient is to be assigned to a Primary Care Provider, who is responsible for coordinating a patient's overall care. Thus, the Associate Provider on a Primary Care Team must be assigned to a preceptor who can be a Primary Care Provider (must have a Primary Care Provider preceptor assigned to them).
AUSTIN AUTOMATION CENTER	The central repository for National Care Patient Care Database.
AUTO TEAM ENROLLMENT/DISCHARGE	This is an option when setting up Teams that will automatically enroll a patient to a TEAM when the patient is enrolled in a clinic that is associated with that team. You can also discharge from a TEAM (if not assigned to a position in a team) when the patient is discharged from a clinic associated with that team.
BUTTON BAR	A Button Bar is also referred to as a Tool Bar. Small boxes that contain graphic figures that represent various functions.
CALENDAR DISPLAY	Within PCMM, when there is a date field, the user can "double click" the field and a miniature calendar will 'pop up' for selection of a date and year. This is used for Activation and Deactivation dates as well as Discharge dates.
CLERK	This person is a clerk who performs data entry.
CLINICAL PHARMACIST	Performs patient care duties related to patient medications as assigned or granted by the appropriate governing committee at the facility. These privileges may include and may or may not be limited to: (1) Initiation of renewal orders for chronic maintenance medications (2) Initiation of orders for laboratory tests necessary to monitor existing drug therapy.
CLINICAL SERVICE	A Service defined at the medical center, e.g. MEDICINE, SURGERY, INTERMEDIATE MEDICINE, etc.
CLOSING	Another term for 'inactivating' a position or team.
CONSULTS	When a patient is referred to a clinic on a one-time basis, he/she is not normally enrolled in that clinic.

CONTROL KEY	A Control Key is the key on the lower left and right hand side of the keyboard that is entitled 'CTRL'. When a user presses this key along with another character (e.g. CTRL + O), the user can select and OPTION, etc.
DATABASE	This refers to the information that is stored in your medical center's computer program, e.g., patient information, service information, clinic information, etc.
DIALOGUE BOX	A dialogue box is a box or window that is placed within a screen that allows the user to enter a 'free text' message or description of the object being created (in some cases, the description of what a team is supposed to represent).
DIETITIAN	Performs patient care duties related to nutrition and weight management
DISPLAY BOX	This is a 'box' or window that 'DISPLAYS' information or lists available clinics, positions or teams to choose from. The user may select an item from the list displayed.
DOUBLE ARROW	A 'double arrow' is just that (two arrows next to each other) indicating that more than one patient name may be moved over from an inactive status to an active status and back to an inactive status. (>>)
DROP DOWN LIST	When a user selects an item from the MENU BAR, a list is displayed in a vertical format. For example, if a user selects FILE, a list drops down showing all options that are available under the main heading FILE: File, Edit, Print, Save
E3R	Electronic Error and Enhancement Report system is located on the VA FORUM mail system. The utility provides tools for entering, tracking and reporting Enhancement requests for ***V**ISTA* packages.
E-MAIL MESSAGES	These are the messages that are generated by a software event that delivers information to designated users via MailMan. E-mail messages in the PCMM module would include information about death notifications, inpatient movements, consult notifications, and team notifications or changes.
ENHANCEMENT	An 'enhancement' to an already existing Class I software package is the introduction of new or improved functionality.
GUI	Graphical user Interface
HIGHLIGHT	To 'Highlight' a name, team, position or date, one would place the cursor (or arrow) on the name, team or position they wish to choose and 'click' the mouse button to select it or highlight it.
HISTORY FILE	Although not specific to any one document, a history file is a compilation of various pieces of information pertaining to individual teams, positions, etc. for future reference and clarification.
ICON	An Icon is an image or snapshot of something that is visually understood and is represented in a 'box'. For instance, an ICON that stands for 'cutting' a piece of text out of a document would be a box with a picture of a pair of scissors in it. They are also known as 'buttons'.

INTERN (PHYSICIAN)	Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner. Duties include but may not be limited to (1) completing history & physical examinations, (2) obtaining blood and other specimens, and (3) provision of patient medical care as permitted. Cannot act as Primary Care Provider. The Intern is an Associate Provider within a Primary Care Team (see Associate Provider Term).
IRM	Information Resources Management
LOG OFF	This is referred to logging off or signing out of a particular software package or system. To end the session, to 'get out' of a package, etc.
LOG ON	This is referred to logging on or signing onto a particular software package or system. To open or start a new session.
MACRO	A shortcut for performing various tasks. For example, the CTRL key (as explained above), combined with certain letters performs functions or tasks without having to select a menu bar item.
MAS ADPAC	Medical Administration Service Automated Data Processing Applications Coordinator
MEDICAL STUDENT	Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner.
MENU BAR	A Menu Bar is usually listed at the TOP of a computer screen and it, unlike the tool bar, displays words as opposed to pictures. For example, the menu bar for FILE OPEN can be selected, but it can also be selected from a picture of a folder opening. The menu bar is just the 'words' for various functions. The menu bar as 'drop down lists' as explained above.
MODULE	A portion of a major software package, e.g. Primary Care functionality is considered a MODULE of the Scheduling package.
National Online Information System (NOIS)	System used by the field to report errors and problems with **V***IST***A** applications and by the Chief Information Office (CIO) to respond with information and suggestions.
NURSE (LPN)	Provides a variety of nursing services that do not require full professional nurse education, but are represented by the licensing of practical and vocational nurses by a State, Territory or the District of Columbia. Persons in these positions may also provide administrative assistance, such as making appointments, etc.
NURSE (RN)	Provides care to patients in clinics and other settings, administers anesthetic agents and supportive treatments to patients undergoing outpatient surgery and other medical treatments, promotes better health practices, and consults or advises nurses providing direct care to patients. Persons in this position require a professional knowledge and education in the field of nursing.

NURSE PRACTITIONER	Performs patient care duties in accordance with Scope of Practice under the supervision of a designated physician or physicians and Medical Center Policy. Duties include by are not limited to appropriate assessments, orders diagnostic tests and consultations as necessary, prescribes treatment interventions in accordance with established protocols, provides or arranges follow-up care, and provides health teaching and supportive counseling. Is authorized to act as a Primary Care Provider or Associate Provider. The ability to act as a Primary Care Provider is decided by individual facilities.
OTHER	A general classification for those team members who do not belong in any of the listed Standard Position entries.
PANEL	A panel is a group of individual patients for which the Primary Care Provider has accepted primary care responsibility.
PATIENT PANEL	Group of individual patients assigned to Team/Position/ Practitioner. Can be either Primary Care or Non Primary Care patients; e.g., the Practitioner's Patients Report includes both Primary Care and Non Primary Care patients assigned to the practitioner in the Patient Panel Count.
PATIENT SERVICES ASSISTANT	Provides clerical and patient processing support to outpatient clinics, or other unit of a medical facility, in support of the care and treatment given to patients. This includes duties as receptionist, record-keeping duties, clerical duties related to patient care, and miscellaneous support to the medical staff of the unit.
PC COORDINATOR	Primary Care Coordinator
PCMM	Primary Care Management Module
PCs	Personal computers
PERSON CLASS FILE	Consists of provider taxonomy developed by Health Care Finance Administration (HCFA). The taxonomy codifies provider type and provider area of specialization for all medical related providers.
PHYSICIAN ASSISTANT	Performs patient care duties in accordance with Scope of Practice under the supervision of a designated physician or physicians and Medical Center Policy. Duties include, but are not limited to, diagnostic and therapeutic medical care and services, taking case histories, conducting physical examinations, and ordering lab and other studies. Physician Assistants also may carry out special procedures, such as giving injections or other medication, apply or change dressings, or suturing minor lacerations. The ability to act as a Primary Care Practitioner is decided by individual facilities.

PHYSICIAN-PRIMARY CARE	As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to practice medicine and surgery in a US State, territory or the District of Columbia. As a Primary Care practitioner, the incumbent provides the first point of assistance for a patient seeking care. Primary Care duties include: (1) Intake and initial needs assessment, (2) Health promotion and disease prevention, (3) Management of acute and chronic biopsychosocial conditions, (4) Access to other components of health care, (5) Continuity, and (6) Patient and non-professional care giver education & training. (from IL 10-93-031, Under Secretary for Health's Letter) Can act as Primary Care Practitioner.
PHYSICIAN-PSYCHIATRIST	As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to practice medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Credentials committee) in regard to the practice of Psychiatry.
PHYSICIAN-SUBSPECIALTY	As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to practice medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Credentials committee) concerning the practice of Specialty or Subspecialty care in the areas of Medicine or Surgery.
POSITION	Teams are comprised of one or more staff positions. Individual practitioners are assigned to a team position. A position is designated to serve certain roles in the overall primary care setting.
PRECEPTOR	Responsible for providing the overall care for patients assigned to an Associate Provider or Medical Student. On Primary Care Teams the Preceptor must be able to provide Primary Care.
PRIMARY CARE	Primary care is the provision of integrated, accessible health care services by clinicians that are accountable for addressing a large majority of personal health care needs.
PRIMARY CARE MANAGEMENT MODULE (PCMM)	Primary Care Management Module is the application for VA facilities to use for implementing primary care teams. Teams are created, positions associated with the teams are created, staff members are assigned to positions, and patients are assigned to the teams and positions.
PRIMARY CARE PROVIDER	In PCMM, the Primary Care Provider is the position determined to be responsible for the coordination of the patient's primary care.

PSYCHOLOGIST	Performs patient care duties in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Psychology and Mental Health. This may include individual, family and group counseling and psychotherapy, assertiveness and other behavior training, etc.
REHAB/PSYCH TECHNICIAN	Provides patient care in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Psychology and Mental Health. This may include individual, family or group counseling. A degreed Psychologist or Mental health practitioner typically supervises the incumbent.
RESIDENT (PHYSICIAN)	Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner. Duties include but may not be limited to completing history and physical examinations, obtaining blood and other specimens, and provision of patient medical care as permitted. The resident is an Associate Provider within a Primary Care Team. As a Resident, the incumbent is responsible for providing patient care as directed by the Preceptor. Cannot act as Primary Care Provider.
RIGHT CLICK	Normally on a computer 'mouse' there is two buttons at the top of the mouse. The button or area that can be 'clicked' on the right, is known as the RIGHT CLICK button.
ROLE	A function or task of a staff member involved with the implementation, maintenance and continued success of primary care.
SOCIAL WORKER	Performs patient care duties in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Social Work. Provides direct services to individuals, groups and families with counseling, discharge planning, crisis intervention, etc.
SPECIALTY CLINICS	A set of clinics that are defined as SUBSETS of generalized Service clinics such as Cardiology (specialty of Medicine); Orthopedics (specialty of Surgery), etc.
TEAM	Teams are groups of staff members organized for a certain purpose (e.g., Primary Care).
TEAM PHARMACIST	A pharmacist who: (1) Is authorized to Fill/Dispense medications (2) Enter/Verify medication orders (3) Provide patient education relating to medications (4) Renew established medications under the protocols defined by the medical center.
TEAM PROFILE	This is a screen within PCMM that shows the various characteristics of a particular team, e.g., number of patients allowed for enrollment, name, positions assigned, etc.
TEXT BOX	The text box is also known as the DIALOGUE box as described above. It provides the user with an area in which to identify certain characteristics of a particular component of PCMM. For example, the description of what a team is for (provides primary care to patients that have been discharged from the hospital within the last 6 months).

TITLE BAR	Title bar is the bar that shows the TITLE of the screen that the user is presently accessing. For instance, the TITLE BAR on the Team Set-Up screen could be 'Team Profile'.
TOOL BAR	The Tool Bar is what is displayed either at the top of the screen or at the button, and contains a picture of all of the available ICONS that may be chose to perform certain tasks. Unlike the MENU BAR, the menu bar contains the 'words' for functions, whereas the TOOL BAR contains the 'pictures' that represent functions.
TOOL BUTTONS	A tool button is ONE of the icons that is shown across the top (or bottom) of a screen on the TOOL BAR.
UNIQUES	Uniques for the purpose of PCMM Primary Care are defined as the individual veteran (patient) enrolled in VA health care that make up the primary care provider's panel.
USER CLASS	User Class is a file that will be transported with the Primary Care Management Module that stores the users (physicians, social workers, staff clerks, etc.) actual position titles as defined by the site.
V*IST*A	Veterans Health Information Systems and Technology Architecture, formerly known as Decentralized Hospital Computer Program, encompasses the complete information environment at VA medical facilities.

Appendix - Mass Discharge Scenarios

The following is a matrix describing the possible scenarios that can be present when the mass discharge functionality is execut taken for each scenario. Many scenarios take no action. They require business rule definitions that currently do not exist.

Term Definitions

Effective Date	- Date selected by user for discharge date
Current	- Assignment date is on or before the effective mass discharge date
Future	- Assignment or discharge date is after the effective mass discharge date

Item	Type	Team Assignment Date	Team Unassignment Date	Patient Assigned to Position(s)	Position Assignment Date	Position Unassignment Date	Action Taken by New Funct
1	Team	Current	None	No			a) Discharge from team b) List patient as discharge
2	Team	Current	None	Yes	Current	None	a) Discharge from positions b) Discharge from team c) List team and position di
3	Team	Current	None	Yes	Current	Future	a) Change position discharg date b) Perform team discharge c) List team, position disch discharge date change in
4	Team	Current	None	Yes	Future	None	a) Delete position assignme b) Perform team discharge c) List team discharge and deletion in message
5	Team	Current	None	Yes	Future	Future	a) Delete position assignme b) Perform team discharge c) List team discharge and deletion in message
6	Team	Current	Future	No			a) Change team discharged b) List team discharge and change in message

Item	Type	Team Assignment Date	Team Unassignment Date	Patient Assigned to Position(s)	Position Assignment Date	Position Unassignment Date	Action Taken by New Funct
7	Team	Current	Future	Yes	Current	None	a) Discharge from positions b) Change team discharged c) List team and position di discharge date change in
8	Team	Current	Future	Yes	Current	Future	a) Change position discharg date b) Change team discharged c) List team and position di and position discharge d
9	Team	Current	Future	Yes	Future	None	a) Delete position assignme b) Change team discharged c) List team discharge, tean and position assignment
10	Team	Current	Future	Yes	Future	Future	a) Delete position assignme b) Change team discharge d c) List team discharge, tean and position assignment
11	Team	Future	None	No			a) Delete team assignment b) List deleted team assignr
12	Team	Future	None	Yes	Future	None	a) Delete position assignme b) Delete team assignment c) List deleted team and po: message
13	Team	Future	None	Yes	Future	Future	a) Delete position assignme b) Delete team assignment c) List deleted team and po: message
14	Team	Future	Future	No			a) Delete team assignment b) List deleted team assignr

Item	Type	Team Assignment Date	Team Unassignment Date	Patient Assigned to Position(s)	Position Assignment Date	Position Unassignment Date	Action Taken by New Func
15	Team	Future	Future	Yes	Future	None	a) Delete position assignm b) Delete team assignment c) List deleted team and pc message
16	Team	Future	Future	Yes	Future	Future	a) Delete position assignm b) Delete team assignment c) List deleted team and pc message
17	Position			Yes	Current	None	a) Discharge patient from b) List position discharge i
18	Position			Yes	Current	Future	a) Change position dischar date b) List position discharge a date change in message
19	Position			Yes	Future	None	a) Delete position assignm b) List deleted position ass
20	Position			Yes	Future	Future	c) Delete position assignm d) List deleted position assi

Note on Future Assignments: Any assignment active after the effective date but not active TODAY will not be modified or del history of that assignment. Any modifications to these assignments will need to be accomplished using PCMM GUI. The MailI assignments falling into this category have not been unassigned.

Clinic Discharge Rules

Item	Type	Position Associated with Clinic	Action Taken by New Functionality
1	Team	No	a) No Action
2	Team	Yes	a) Ask user whether patients enrolled in clinic should be discharged from cli This question will be asked for each position associated with a clinic. It w selected a team and before the list of patient team assignments is presente not be prompted with this question for each patient selected. b) List clinic discharge information in message.
3	Position	No	a) No Action
4	Position	Yes	a) Ask user whether patients enrolled in clinic should be discharged from cli It will be asked after the user has selected a position and before the list of presented. In other words, the user will not be prompted with this questior b) List clinic discharge information in message.